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Nonprofit World

Advancement Through Sharing

Risk & Your Brain

Taking Smart Risks & Making the Best Decisions

PLUS:

- Fundraising in the Age of COVID
- Are You Prepared for a Cybersecurity Incident?
- How Can You Boost Board Turnout?
- Top 10 Things Donors Want
- The Power of Crowdfunding
- Is Discrimination Putting You at Legal Risk?
- How to Foster Creative Breakthroughs
- Making Better Mistakes

... and more

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SOCIETY for NONPROFITS
Advancing the nonprofit world together

Publisher

Society for Nonprofits

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contents

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FEATURE STORY

Your brain is easily distracted, inattentive, unreliable, and surprisingly forgetful. That's why it's vital to understand how your brain reacts to risk. You need to practice good risk-management strategies so that you'll be prepared for whatever the future brings. Take a look at **"Risk & Your Brain"** on page 14.

ARTICLES

DEPARTMENTS

The Kettering Principle of Serendipity

There's a helpful insight in the origins of the word "serendipity." It was coined by Horace Walpole in 1754 when he told a friend about a fable he was reading, *The Three Princes of Serendip* (Serendip is the Perso-Arabic name for Sri Lanka), about men who "were always making discoveries, by accident and sagacity, of things which they were not in quest of."

It's important to note that he mentions "sagacity" as well as "accident," because we often think of serendipity as pure chance. It's not. It's a combination of a happy accident and the wisdom to seize possibilities when they arise. Accidents happen often, but not everyone turns them into opportunities.

To be struck by serendipity, you need to be keenly aware of your surroundings, keep your mind open wide – and be a bit restless. You can't blaze new trails while reclining in a La-Z-Boy, as Eric Weiner notes in *The Geography of Genius*. You need to be moving, engaging with your environment.

It's known as the Kettering principle. The engineer Charles Kettering urged his employees to keep moving. "I have never heard of anyone," he said, "stumbling on something sitting down."

Of course, restless movement itself won't produce ingenious solutions. You need to know yourself and be in touch with your mind and your body. Sometimes that means adding purposeful stillness to the mix. "Become a Mind-Body Leader" (page 34) details a centering technique that will ready you for new ways of thinking.

"How to Foster Creative Breakthroughs" (page 33) illuminates ways to nurture "divergent thought." With this type of reasoning, you generate innovative ideas by exploring a vast array of diverse solutions. While "convergent thinking" follows logical steps to a conclusion, "divergent thinking" is free-flowing and non-linear. It arises out of curiosity, playfulness, and an openness to unexpected connections. It's out of such brainwork that serendipity happens.

"A Better Brand = More Loyal Supporters" (page 18) testifies to the importance of challenging assumptions. Every so often, Isham Colosetti explains, you need to look at your brand through fresh eyes. Your customers are always changing, and so must you if you're to satisfy their desires.

If you want people in your organization to break new ground, the first step is to create an organizational culture that welcomes mistakes, risk-taking, and new perspectives. "Does Your Culture Facilitate Fundraising?" (page 31) sheds light on the need to embrace change. "Risk & Your Brain" (page 14) explains how to take constructive risks and minimize destructive ones. "Making Better Mistakes" (page 17) reframes errors as useful lessons. Indeed, mistakes are often the portal to serendipity at its best.

Much of Weiner's book about genius focuses on the ancient Greek culture. How did this one place produce such an amazing number of ingenious ideas? One key, he found, was that Greece welcomed foreigners, incorporated their customs, and weren't afraid to borrow, steal, and embellish the best of other countries.

Borrowing from different realms is a classic strategy of creative people. To come up with new approaches, you need to constantly take ideas from your environment and make them your own. "Reinvent Yourself" (page 31) offers exercises to help you do so.

It helps to stay on the lookout for surprising juxtapositions. When you see two unrelated things bumping together in an unusual way, open your eyes and take notice.

Don't underestimate the role of coincidence – and what Weiner calls its "close cousins, randomness and chaos" – in successful creative endeavors. But, at the same time, don't forget the importance of staying on the move. It's when you combine that restless searching, that constant movement, with the unpredictability of chance that great ideas arrive. That's when you reap the magic of serendipity.

Jill Muehrcke, 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. **Decide how to take advantage of crowdfunding** with the tips on page 8.
2. **Review your cybersecurity plan,** using the the keys in "Are You Prepared for a Cybersecurity Incident?" (page 20).
3. **Begin doing the exercises** and include others in asking and answering the questions described in "Useful Exercises" (page 24).
4. **Pinpoint the main growth problem in your organization,** and reframe it as explained in "Three Expensive & Common Nonprofit Conflicts" (page 10). You'll be taking the first step toward solving it.
5. **Plan your next meeting with an eye on the ideas** in "Improve Your Meetings & Your Decision-Making"(page 15).

Is This a Possible Conflict of Interest?

What should board members do when they think they see conflicts of interest?

Q I'm working with an all-volunteer nonprofit that has a possible conflict of interest. The board president pays a member of his family (who is on the board) to mow the grass at our facility without putting the job out to bids or seeking other estimates. In addition, the president pays his father (who is also on the board) when his father purchases materials and installs things (such as ceiling fans) in our buildings. Other members of the board are concerned about this but are afraid to broach the subject. They're looking for guidance on how to handle this situation.

A The only way to handle the situation is to face it and deal with it. It's an obvious conflict of interest when an organization contracts with members of the board or their family members to provide goods or services to the organization. It's not necessarily illegal, however, if the cost is fair to the organization.

You don't identify the tax status of your organization, but if it's a 501(c)(3) public charity or a 501(c)(4) social welfare organization, paying too much for these services can be considered an "excess benefit," with serious tax consequences for those who receive the excess or for those who knowingly approve the excess. There may not be enough involved here for the IRS to get involved, but the "safe harbor" procedures for determining whether the payments are reasonable or not would provide a good guide for your organization to be sure that things are okay. Unless your board is going to prohibit any conflicted transactions (which in general I don't think is a good idea), it ought to require that these safe harbor rules be put into place so that everyone can be confident that what they're doing is within the law.

Don Kramer, Nonprofit Issues, nonprofitissues.com

Also see these articles at NonprofitWorld.org:

Expectations for Nonprofit Boards Are Changing (Vol. 19, No. 3)

Navigating Tough Conflict of Interest Situations (Vol. 27, No. 1)

Conflict of Interest in the Board Room (Vol. 17, No. 2)

How Can You Boost Board Turnout?

What are some ways to get people to show up?

Q We have very poor attendance at our board meetings. How can we assure that more board members come to meetings?

A The best ideas to improve turnout include the following:

Hold fewer meetings. If you gather monthly, try 10 meetings a year. Make each one count a little more.

Schedule many months in advance. Ask trustees to confirm the dates and put them in their calendars at least six months ahead.

Distribute the agenda at least one week before the meeting.

Create interesting, challenging agendas that focus on decision-making. The main reason for poor attendance is that meetings aren't productive or interesting.

Use your board agreement to reinforce attendance requirements. Use language such as, "Three consecutive unexcused absences will be considered resignation from the board."

Feed people. Food provides a welcoming atmosphere, stimulates the brain, and builds camaraderie. People are more likely to come to a meeting if they know there will be something to eat and drink. Ask board members to take turns arranging for food at the meeting.

Rotate responsibility for facilitating the meeting. When participants know their turn is coming, they'll show up to see how others manage the process and learn from their peers.

Andy Robinson, TrainYourBoard, trainyourboard.com, andy@andyrobinsononline.com

Andy Robinson is the author of What Every Board Member Needs to Know, Do, and Avoid *(emersonandchurch.com).*

Also see these articles at NonprofitWorld.org:

Twelve Ways to Liven Up Your Board Meetings – And Your Board (Vol. 36, No. 3)

How to Run the Perfect Board Meeting – While Inspiring Board Members to Raise Funds (Vol. 36, No. 4)

From Bored to Blazing: Fire Up Your Board (Vol. 37, No. 3)

On-Boarding – Or Board Orientation? Welcoming New Board Members

The process is too crucial to approach without careful planning.

By Mike Burns

Yes, indeed, "on-boarding" has become the latest buzzword for what many of us older folks refer to as "board orientation." Language aside, it's important to do something to orient new board members to their new positions.

One hint: Attending their first board meeting the day their term begins isn't the best approach (albeit commonly practiced) for introducing a new board member to the board.

A second hint: While the norm has been to "shop" for board members within board members' networks, instead consider recruiting from volunteers already active within the organization or recruit individuals to board committees, where prospects can get their feet wet while demonstrating their potential as board members.

The work of board members is transactional (discussions, decisions, actions) and relational (the fuel that makes transactions comfortable and effective). A board orientation should be about building relationships as much as about providing information for being an effective board member.

Have These Tools in Place

The core to effective on-boarding is to consider putting the following tools in place:

- **a meet-and-greet event** where current board members meet incoming board members with some formal and informal activities
- **a mentoring program** that matches current board members to incoming board members
- **a board manual** that includes details such as: the organization's theory of change; mission and values; strategies and goals; program overview; current budget; current year/quarter budget versus actual; current year/quarter profit/loss.

> "A board orientation should be about building relationships."

Give New Board Members These Things

On board members' first day, give them:

- **a list of board members;** a board agenda and board reports; board meeting rules of order and calendar of meetings; six-months of board minutes
- **a conflict of interest statement** and a board responsibilities statement (including the amount of money board members are expected to give to the organization each year)
- **bylaws,** articles of incorporation, IRS letter, recent tax return
- **directors' and officers' liability insurance policy**, commercial liability insurance policy, investment and diversity policies, whistle-blower and related risk management policies.

Keep These Keys in Mind

How you conduct the orientation is as important as what materials you give new board members.

Here are some strategies that will help:

- **Formally structure** the on-boarding session to ensure that an incoming board member will become knowledgeable and even conversant in the ways and culture of the board and nonprofit.
- **Incorporate learning styles** using all the senses (yes, food matters).
- **Ask a variety of people** to help present the orientation. It's traditional to have the CEO and board chair (or governance committee chair) conduct the on-boarding event. But experience indicates that it's better to include as many members of the current board, as well as senior staff and even programming staff, as possible. Having them present their stories will provide the new board member with a warmer welcome and an added depth and insight that might not be present with just two or three presenters.
- **Instead of making lots of paper copies** of all the materials board members will need both for orientation and continued transactions, consider going live and creating a board portal or subscribing to a board portal service like Board Effect. You'll save trees and reduce members' needs to carry around reams of paper to do their jobs.

> "You'll save trees and reduce the need to carry around reams of paper."

The first principle of on-boarding: Do it. Make the introduction to your new board members an experience that will serve them throughout their tenure.

Mike Burns (mikeb@bwbsolutions.com) is a partner at BWB Solutions (bwbsolutions.com), a national consulting firm with expertise in planning, governance, organizational assessment, and finance. Each partner at BWB Solutions has unique strengths in core nonprofit disciplines. Since 1994 Mike has supported nonprofits through organizational change and planning, particularly with regard to strategic and sustainability planning. He has a master's degree in nonprofit management from Lesley College and a graduate certificate in nonprofit marketing management from the University of Hartford. He is a contributor to NonProfitPro (nonprofitpro.com), where this article was first published.

Get Everyone On Board

For more perspectives, see articles such as these at NonprofitWorld.org:

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

Got Bylaws? (Vol. 26, No. 4)

Using Board Portals to Keep Directors Connected (Vol. 29, No. 3)

Reciprocal Board Agreements: What Do Board Members Give? What Do They Receive in Return? (Vol. 28, No. 1)

Great Policies & Procedures for Your Organization (Vol. 31, No. 5)

How to Solicit Your Board: Rules for Success (Vol. 35, No, 4)

Planning the Board Orientation: 12 Key Messages (Vol. 34, No. 4)

Tools for Improving Your Board's Diversity (Vol. 25, No. 5)

Can Standing Committees Contribute to High-Impact Governing? (Vol. 25, No. 2)

How to Improve the Process of Change: The Sanctuary Model (Vol. 28, No. 6)

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

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**

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

Use Data to Cultivate Long-Term Donor Engagement

Keep supporters energized with these strategies.

By Annabel Maw

After getting people interested in their cause, many nonprofits find it hard to keep those supporters fully engaged, committed, and enthused. The reason? These nonprofits lack quality data.

Collecting data doesn't seem like a huge priority because it's not front facing, intuitive, or the easiest thing to get. But data can be the gateway into understanding who your community members are and what they want from your organization. Data will give you the information necessary to create segmented e-mail lists, customize outreach campaigns, and more, so you can learn what's needed to get long-term engagement and commitment.

Imagine a Perfect World

The first step in creating a community of engaged supporters is to get a powerful data collection tool. "Powerful" doesn't imply fancy or expensive – it simply means a robust tool that you can use to your advantage. When looking for a data collection tool, start by making an "In a perfect world . . . ." list, which lays out everything you wish your data collection tool could do. For instance: In a perfect world, my data collection tool would:

- **Gather** donors' first and last names, e-mails, and home addresses.
- **Have all collected data automatically transfer** into one place (i.e., MailChimp, Google Sheets).
- **Find out** if constituents are interested in donating, volunteering, or both.
- **See when volunteers are available** for shifts.
- **Collect payment information** and donations.
- **Set up** recurring donations.
- **Learn more** about constituents' interests. (Are they interested in joining the board of directors or becoming an advocate for the organization?)
- **Easily include** the organization's branding.

Once you have your "perfect world" list, start looking into data collection tools that will suit as many of your needs as possible. Since resources are limited, a great affordable go-to is an online form. Online forms were created specifically for data collection so they'll seamlessly collect any type of information you need.

Better yet, online forms are powerful and technologically advanced, so many of them, like JotForm (jotform.com),

offer customizable templates and countless integrations to choose from. Integrations include workflow apps, such as Google Drive, and payment processors, like PayPal and Square.

Online forms are easy to customize with branding and embed into your website, so if you're using Wordpress or a free website builder, it won't be a problem to have them seamlessly blend in with the design that's already in place.

A Good Experience = Better Data

Experience is everything. To get the most data possible, you must use a form that can provide a pleasing user experience. Part of creating this great experience is making sure that the form is relatable and tailored to the audience who will receive it. Each form will vary a bit, but to help you get started, we'll go over some ideas for how to create an excellent user experience with a donation form.

First of all, when you set up the form, put yourself in the donor's shoes. If you were a potential donor, what would you want to see, think, and feel before making a donation? You might want to see a photo of the people you'll be helping. You might want to think about how far each donated dollar goes. You might want to fill out the form as quickly as possible. Drawing in donors with imagery, relevant information, and ease of use will motivate them to fill the form to completion. Some ideas for building a donation form:

Choose the right questions. What type of information is your organization trying to get from donors? Do you want

> Start by making an "In a perfect world . . ." list.

detailed demographics? Do you want to know each person's level of involvement in your organization and interest in donating on a recurring basis? Whatever it may be, crafting good questions will assure that you collect meaningful data, define your donor base, and get more people to engage and commit to your organization.

Insert images or video into your background. Images and video are important to include in a donation form because they evoke emotion and remind constituents about why they're donating to your cause. Visuals also capture and hold people's attention, especially when colorful and interactive, so donors will be encouraged to fill out the entire form.

Employ the "one-click" approach. If possible, use the "one-click" approach so that donors only have to click "Submit" one time to make a donation. Forcing donors to click too many times may result in frustration and less people completing the form. Make sure you also include a well-known payment processor such as PayPal, Square, or Stripe so people feel comfortable donating online.

Use conditional logic. Conditional logic is a great way to simplify the form-filling process. Conditional logic allows you to to show or hide form fields based on how a user responds to a question. For instance, if someone responds "Yes" to "Have you donated before?" another question such as "Which program did you donate to?" will appear. Those who respond "No" will automatically go on to the next set of questions. This will personalize and tailor the form to each respondent.

Brand accordingly. Always make sure your forms include your logo and brand colors. This will reinforce who your organization is and what it stands for. Having consistent branding will also help differentiate your nonprofit from others in the same space.

Put Your Data to Use

One of the biggest perks of data collection is being able to take the information collected and use it to personalize communications. When people receive content that relates to their interests, wants, and needs, they're more likely to take action, get involved, and stay engaged.

Create targeted e-mail campaigns

The first thing to do with your collected data is to create segmented e-mail lists. These will vary for each organization, but a good rule of thumb is to segment based on constituents' interests, such as volunteering, donating, or both.

Once you've segmented your lists, create e-mail content for each group. For instance, if an individual is only interested in volunteering, focus on sending them opportunities on how to get involved. If someone is mainly interested in donating, send them material on current fundraising campaigns.

To make these e-mails even more customized, address people by their first names. Using first names in greetings is much more effective than sending a general "Hi there," because it's relatable and personable.

Say thank you

Thank you's go a long way in building relationships. Having access to robust data will allow you to communicate dynamic "thank you's" through phone, text, or e-mail, which can include the person's first name, the day they donated or volunteered, and how their money or time affected the cause. When you show gratitude toward your supporters, they'll get a morale boost and feel emotionally tied to your organization, which will entice them to keep engaging.

Use data to show recognition

The best way to motivate people to keep giving their time and money is to show them that they're appreciated, valued, and special. An example of doing this with data is to collect birthday information and send out "Happy Birthday" e-mails. These can include a photo or video from your staff or executive director. Sending a happy-birthday e-mail shows that your organization takes the relationship seriously and is willing to go the extra mile.

Annabel Maw is a marketing communications specialist at JotForm (jotform.com), a popular, easy-to-use online form-building tool.

Raising Funds & Using Data Online

For more ways to harness technology and the web to boost support, see these articles at NonprofitWorld.org:

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

Put Your Data to Good Use (Vol. 37, No. 1)

How to Measure Online Fundraising Success (Vol. 26, No. 1)

Beyond the Single E-Mail Message: Running Effective E-Mail Campaigns (Vol. 23, No. 3)

Online Fundraising Success Factors (Vol. 26, No. 2)

Being a Force for Good with Advanced Analytics (Vol. 36, No. 2)

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

Streamline Your Organization – and Raise More Money – with Online Forms (Vol. 36, No. 4)

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

The Power of Crowdfunding

Here's how to take advantage of this huge opportunity to raise money.

By Liz Gousse & Matt McCrosson

First, A Definition

What, exactly, is crowdfunding? It's a method of raising money through many relatively small donations during a set period of time, typically for a specific campaign or goal, through an online platform. It lowers barriers to new donors and gives you access to larger audiences in a simple, shareable platform.

Thanks to websites and apps like Kickstarter, Indiegogo, and a host of smaller and more specialized providers, crowdfunding has never been more popular. It's shaking up the entire fundraising and donation process, from who's asking for money to who's giving it and what they expect in return. By 2025, the crowdfunding industry is expected to grow to more than $300 billion.

If you ignore this growing influence, crowdfunding could serve as a major disruptor as people seek out new ways to give. But if you tune in to the power of crowdfunding, you'll have a huge opportunity to increase donations.

> "Can you state the goal in 10 words or less?"

How Can You Make the Best of This Opportunity?

Here's a closer look at four ways you can take advantage of this fundraising opportunity:

1. Maximize the impact of advocates – and their networks.

Crowdfunding is built on people who believe in your cause. Getting your advocates to share the campaign with their networks is crucial. Every share is like a personal endorsement of your cause and your crowdfunding campaign.

Of course, social media is the key medium for spreading the word. People's shares can have a compounding effect as friends and family share with their networks, increasing exposure and the number of potential givers.

Be sure to make your campaign compelling and easy to share. Create a call to action that makes it easy for others to communicate the importance of the campaign.

Research shows that adding videos and stories to your campaign will increase the amount raised. Millennials are especially fond of video and spend much of their online time watching and sharing videos. And personal stories are perhaps the most powerful tool a fundraiser has. Stories engage people. They're easy for people to share and to

remember. When you combine personal stories *and* video, you boost your response rate even more.

Look to your most vocal supporters, and "digitally deputize" them to take ownership over your campaign. When you do so, make sure the crowdfunding campaign is structured so donations go directly to the nonprofit, not any intermediary. This ensures the tax deduction goes to the actual donors.

2. Eliminate barriers between donors and your cause.

With a compelling message and a team of committed advocates, your giving request can spread far and wide – using the right platform. It's important to take a look at the fine print when choosing between services. Some platforms, like Kickstarter, use "all-or-nothing" funding, meaning a project is only funded (and donors are only charged), when a project meets a funding goal created at the outset of the campaign. Others, like Indiegogo, can be structured so an organization keeps the money it raises whether it meets its goal or not.

Virtually all platforms take a cut of the money raised. You need to look at the tradeoffs of various sites. Defined platforms make creating, maintaining, and sharing the campaign easier. Kickstarter has a built-in audience – it's hosted more than 400,000 campaigns. On the other hand, nonprofits that put the work into creating their own customized campaigns keep 100% of the amount they raise.

3. Create a direct call to action with clear benefits.

In many cases, effective crowdfunding creates a specific ask that's a subset of the organization's overall mission. Defining the scope of the campaign is important. You and your supporters should be able to state the goal of the campaign in 10 words or less.

Put strategy behind the donation levels you ask for and the incentives you might provide. These statistics uncover some clear best practices:

- The average successful crowdfunding campaign raises around $7,000.
- The average campaign lasts around nine weeks.
- Campaigns that can gain 30% of their goal within the first week are more likely to succeed.

4. Supplement traditional fundraising strategies.

Don't rush to cancel your direct-mail campaign or other tried and true fundraising methods. A so-called "old-school" fundraising mentality should still be the central strategy behind many initiatives.

But you need to recognize that donor demographics are changing. More and more millennials are at a point in their lives where they're able to give. They have different expectations around technology and don't want to donate like their parents did. With the right preparation and execution, crowdfunding can be an excellent way to reach these would-be donors and round out an effective fundraising strategy.

> "Millennials don't want to donate like their parents did."

> "Don't rush to cancel your direct-mail campaign."

Liz Gousse is consulting-services senior manager, and Matt McCrosson is a partner, at PKF O'Connor Davies (pkfod.com), a certified accounting and consulting firm.

For More Details
(NonprofitWorld.org)

Should Crowdfunding Be Part of Your Toolbox? (Vol. 34, No. 2)

Here Come the Millennials — and Their Money (Vol. 34, No. 3)

The Peer-to-Peer Fundraising Evolution (Vol. 30, No. 6)

The Best Way to Tell Your Organization's Story? Capture It on Video (Vol. 35, No. 4)

Crowdfunding Success for #GivingTuesday and Year-End Fundraising (Vol. 35, No. 3)

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

Three Expensive & Common Nonprofit Conflicts: Turn Your Struggles into Wins

Every nonprofit must reconcile these goal-related conflicts. Here's a way to make it less tortuous.

By Karen Eber Davis

Conflicts are inherent in all groups. But some conflicts – goal conflicts baked into the system – are specific to nonprofit organizations. That's because nonprofits seek three bottom-lines: mission, community, and money, unlike governments and businesses that seek a single bottom line (votes and profit, respectively). Seeking three results at the same time leads to special challenges.

Since goal conflicts come with the territory, to succeed you need skills to manage them. What happens if you lack or don't use these skills? Stagnation. Lost revenue. These bottom-line conflicts lie at the epicenter of nearly all the trouble nonprofits have raising funds and creating sustained income.

Use "Name and Reframe"

Naming your conflict will help you make tremendous progress on challenges that previously stumped you. Why? Named conflicts lose their mystery. They gain portability. Portability allows you to mentally move problems from their current context, or reframe them, and play with solutions.

By classifying conflicts, you can help your organization stop cross-purpose efforts. Names help people discuss fears and explore ways to reduce them. Reframing allows you to ask this interesting question: How can we move toward all three bottom lines simultaneously in this situation?

The Three Conflicts

Here are the three expensive and common conflicts inherent in all nonprofits, along with an example of each, and a question you can ask to reframe the issue.

Conflict: Mission & Money vs. Community

Example: A donor gives $2,000,000 to your organization. Success securing other donations sharply decreases.

Reframing Question: How might you use the donor's gift to grow your community?

Conflict: Money & Community vs. Mission

Example: Your full event calendar leaves everyone with minimal energy for improving mission results.

Reframing Question: Which events can you tweak so that they offer opportunities to grow your mission, your community, and your revenue all at the same time?

Conflict: Mission & Community vs. Money

Example: Almost all your efforts go toward your mission. This results in constant revenue shortages.

Reframing Question: How can you rethink how you do your mission today to enhance your revenue streams tomorrow?

Your Challenge

Identify your slow or stalled income growth efforts. What role do bottom-line conflicts play? Name the conflict or conflicts. As you do, watch for shifts in your thinking. Simply being aware of these three conflicts will help you juggle them.

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.*

Reframe & Overcome

For more on reframing your challenges, see these articles at NonprofitWorld.org:

Sustainable Forever: How to Develop Income for the Long Term (Vol. 38, No. 1)

The Mission Myth (Vol. 33, No. 1)

Do You Know Where Your Goals Are? (Vol. 26, No. 5)

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

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

How Changing Your Lenses Will Strengthen Your Leadership (Vol. 34, No. 2)

Making Much of Little: Turning Untapped Assets into Gold (Vol. 36, No. 1)

The Risk of Not Risking: Experimenting with New Sources of Income (Vol. 35, No. 2)

What Does It Mean to Lead Volunteers?

A pioneer in the volunteer field offers insights and inspiration.

By Marlene Wilson

What do we mean by leadership? This quote from Mike Murray says it all:

> A leader is someone who dreams dreams, has visions, and can communicate those to others in such a way that they, of their own free will, say "Yes!"

Let's examine the critical components of this definition for a moment. Having dreams and visions is not about where we are but where we want to be. That sounds so easy, logical, and even fun, so why don't we do more of it in the field of volunteer administration? I would suggest it is because we are too busy doing, surviving, and coping. Who has time to dream except at 2:00 a.m.?

Therefore, one of our biggest challenges is to shift our basic paradigm about how we do leadership (not how we talk about it). As you begin your journey as a volunteer manager, make dreaming a priority, not an afterthought!

The Test of a Good Leader

I suggest the test of a good leader needs to stop being "How much have I done?" and become "How many others have I involved?" This entails not doing all the work, but seeing that it is done and done well. This is an enormous and critical shift for volunteer administrators. It is the difference between being a doer and becoming a leader. When you master the skills of delegation and collaborative team building you will begin to have time to dream.

I always find the best way to start dreaming is to ask myself the question "What if . . .?" and let my imagination and energy combine to romp through the possibilities. For example, my current dream is: What if we truly learned to form and use collaborative, synergistic teams of volunteers and staff among organizations and sectors in our communities? It boggles my mind what we could accomplish!

Motivating Others to Action

The other important concept in Murray's definition of leadership is to communicate your dream to others so that they voluntarily and eagerly say yes. That sounds like volunteer recruitment, doesn't it?

Have you ever been motivated to action by a half-hearted, apologetic, tentative presentation? The clearer the vision and the more enthusiastically committed the leader is to it, the more likely it is that people will catch that vision.

People have to see, feel, and experience the excitement and clearly understand how they can help make it happen. This is why a good organization mission statement is your most effective and compelling recruitment message. People want to make a difference, and they need to know what you are doing about a cause they can care about.

> "Make dreaming a priority, not an afterthought!"

Vision Needed

Warren Bennis once defined vision as "a target that beckons." I have also heard it referred to as "a preferred future." It is that powerful and compelling dream about where we want to go that mobilizes people to help us get there. Every organization and every volunteer program needs a clearly articulated vision and it is the responsibility of leadership to provide it.

Marlene Wilson has been in the field of volunteer management for over 35 years. She is the author of Visionary Leadership in Volunteer Programs, *from which this article is adapted (available from energizeinc.com).*

Leading for Impact

Make a difference as a volunteer leader with articles such as these at NonprofitWorld.org:

- **Building Trust with Your Volunteers** (Vol. 34, No. 4)
- **Better Delegation = Better Leadership** (Vol. 37, No. 3)
- **Big Dreams, Little Steps** (Vol. 30, No. 3)
- **Common-Sense Answers about Volunteer Involvement** (Vol. 34, No. 1)
- **Grounded Visioning: A Quick Way to Create Shared Visions** (Vol. 26, No. 4)
- **The Volunteer Leader as a Facilitator of Change** (Vol. 36, No. 3)
- **How to Tap into Purpose to Motivate People** (Vol. 38, No. 2)
- **Think, Dream, and Do** (Vol. 28, No. 6)
- **Prospective Volunteers Are Closer than You Think** (Vol. 37, No. 1)
- **Sharpening Your Mission Statement** (Vol. 35, No. 4)

Listening to Community Voices

As we rebuild our communities, let's ensure all voices are heard.

Reviewed by Terrence Fernsler

Building Community: 12 Principles for a Healthy Future.
By James S. Gruber. 337 pages. Softcover. New Society Publishers (newsociety.com).

The events of 2020 are exposing just how interconnected we all are. This year's disruptive events will leave us with a great opportunity to start anew: We needn't return to a "normal" that disconnects and disenfranchises many of us.

Repairing the damage that's been done will take time (after all, it took a long time to get here). We can no longer afford to isolate people, including ourselves. It takes all participants, not just those we call leaders, to create a regenerative community.

In this splendid, readable book, James Gruber explains how to strengthen community by:

- **inventorying** untapped community assets
- **developing** inclusive participation
- **being flexible** through authentic and transparent communication.

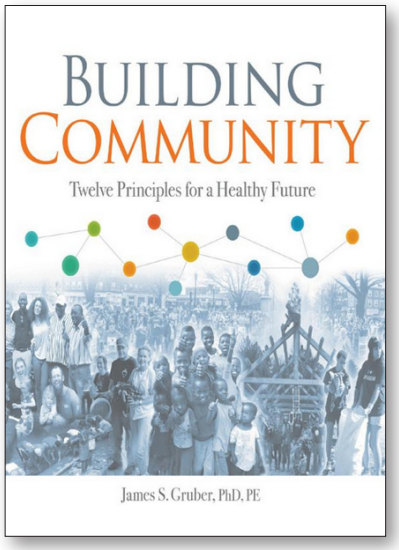
He explores ways to encourage, not compel, participation through 12 community-building principles. Here are a few:

Involve everyone. The people of the community are the best source of planning and creating positive change. When making decisions, include everyone who will be affected, and be sure you heed the voices of underrepresented populations.

Work together. Don't push an idea without support from others. Instead, start slowly, and build a following of supporters as you go. Don't move too quickly in creating collaborations; these need to grow naturally as you work together and trust develops.

Protect resources and promote fairness. Managing natural resources and distributing benefits fairly requires planning with a longer time frame than is typical. It's critical to address equity, realizing that while some have more resources than they need, others don't have enough. Environmental justice is an imperative that includes recognizing local values.

> "We needn't return to a "normal" that disconnects us."



Support research. "Thorough and ongoing research presented as accessible and shared information is integral to the success of any community-based initiative," says Gruber. When gathering data, it's vital to include indigenous local knowledge. Information from many diverse sources is needed to inform community-wide decisions.

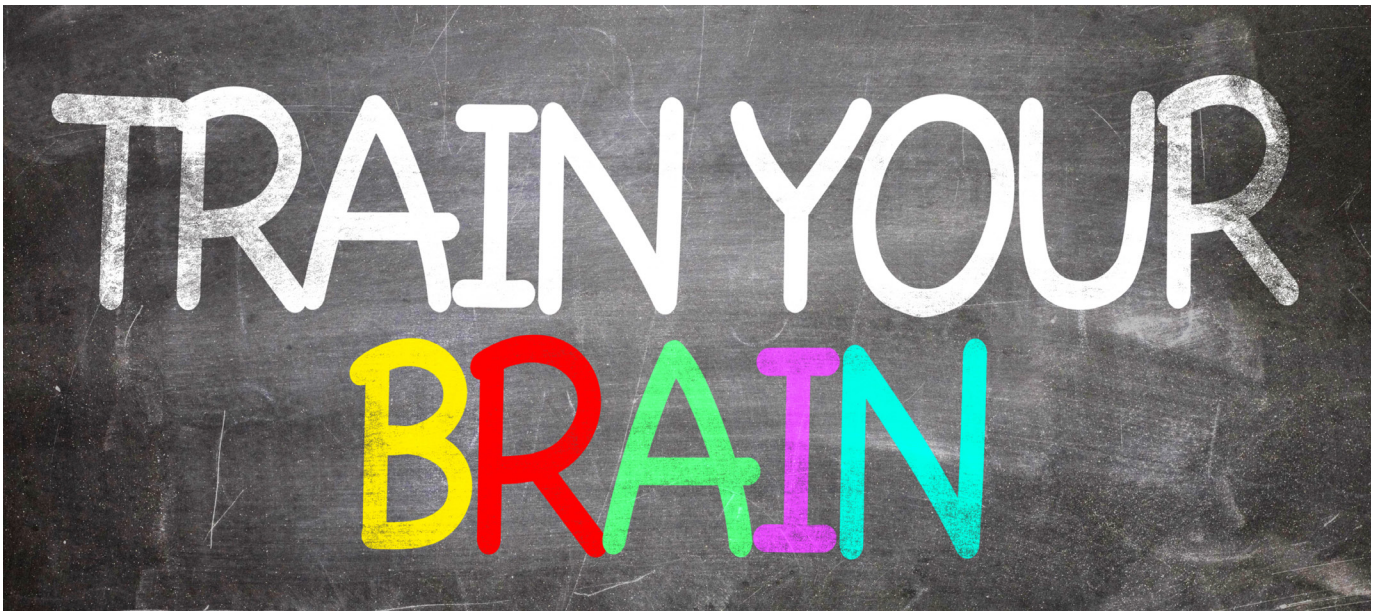
Anticipate conflict and work toward resolution and cooperation. "The best way to resolve conflicts," Gruber says, "is to prevent them from forming." If you practice the other 11 principles, you'll have far fewer conflicts. Conditions are ripe for conflict if people don't believe their voices are heard. When people are upset, there are often underlying issues that need to be acknowledged. Active listening and recording what people say are good steps toward showing respect, building trust, and reducing conflict.

These principles are guidelines, not rigid formulas. The intent is to patiently empower people and organizations to achieve mutual goals. Gruber presents plenty (yet not an overabundance) of examples where he has seen this happen, relating how different communities were able to successfully employ inclusion and empowerment.

A focus on mission is essential. It's when we put our values into action that we're most likely to create meaningful equity, purpose, and trust.

Building inclusive communities is crucial to regenerate failing ecosystems and economies. Using the principles in this book can help us and our organizations develop our own responsive communities.

Terrence Fernsler, MNPL, PhD (fernslts@jmu.edu), a nonprofit professional for over 35 years, is an instructor and advisor, James Madison University Nonprofit Studies, and instructor in Nonprofit Management & Leadership for the Master's of Public Administration, Bush School of Government & Public Service, Texas A&M University.



Risk & Your Brain: Taking Smart Risks & Making Better Decisions

What do your brain's quirks have to do with how you assess risk and make decisions? Quite a lot.

By Melanie Lockwood Herman

Brain chemistry interacts with nonprofit leadership in some quirky ways. Reading Dean Burnett's book, *Idiot Brain*, I've been amazed at how relevant it is to the way we manage risk in nonprofit organizations.

In his chapter on fear, Burnett explains that although the fears of early humans were limited to life-endangering hazards, the modern brain "can find literally *anything* to fret about." And, he adds, "anything that might have a negative consequence, no matter how small or subjective," is perceived as worthy of worry, anxiety, and fear.

Keep Fear under Control

Control fear with these practices:

Don't consider every possible risk. It's essential to be aware of potential risks, but don't go overboard. Creating an exhaustive list of *what-ifs* takes time away from the *what-next?* discussions that reduce fear and ratchet up resilience. Prioritize the risks to your organization, and focus on the most crucial ones.

Be careful when making connections. Because the human brain is always seeking out patterns, people have a propensity for *apophenia* – seeing connections where there aren't any. You might have witnessed this tendency if you know any conspiracy theorists. Although it's important to look for connections among top risks at your nonprofit, doing so obsessively can lead you off track and ramp up unnecessary fear.

Take a breather. If you sense anxiety taking over during a discussion, take a moment to step back, take a breath, and refocus. Remember that risk management revolves around ever-present uncertainty, which tends to spark fear in our minds. We must accept uncertainty to remain levelheaded when assessing risks and possibilities.

Capture the Right Memories

In contrast to short-term memory, which lasts for a maximum of one minute, long-term memories are limitless. On the upside, every past and future happy experience will be permanently imprinted in your brain. On the downside, retrieving even happy memories can be challenging and frustrating.

Memories that include emotional sensations (i.e., we remember how we felt when the event took place) are easier to recover than memories without emotional content. Why?

Because emotions, sensations, and thoughts create additional links (a bit like the metadata on a web page used to optimize search-engine results), adding importance to a memory.

To help your team retrieve memories of sound nonprofit practice:

Connect key concepts to stories. Personal stories make advice more memorable. Storytelling proved itself an effective learning tool long before the written word, and it still reigns today.

Suppress your egocentric bias. People are highly sensitive to recent criticism but more willing to honestly reflect on actions they took in the more distant past. Knowing this, don't limit your own self-scrutiny to actions from a different time or under different circumstances. Don't fall into the trap of limiting criticism to the past and praise to the present.

Recognize subjective bias as strength. Our subjective lenses and stored memories are as unique as fingerprints. Two people can have the same experience and remember it in different ways, sometimes dramatically so. So don't assume that your take is clear and another's is cloudy. Ask other people on your team:

- What do you remember about that decision? The events leading up to the decision?
- What did the environment look like then versus now?
- How do you recall the steps taken after the incident?

When combining everyone's memories, you'll have a more comprehensive and validated collective memory.

Close the loop. Burnett reminds us that our brains don't like things being incomplete. Morale worsens when leaders let time pass before releasing the results of an employee survey, a risk assessment, or other activities in which staff were asked to participate. Even greater frustration erupts when there's a lag between talking about a decision to act and actually taking action. Closure is so critical that sometimes we're satisfied with a false sense of completion. Know when to close the loop, and close it with conviction and meaning.

Understand How Decision-Making Works

The heart of effective risk management is effective decision-making. To guide your team to the best possible risk-based choices:

Reflect on individual and group decisions. Ask yourself: Are we individually and collectively making decisions that ward against undesirable risks and cultivate opportunities for taking desirable risks? Spend time reflecting on past decisions, showcasing why some decisions fell within your appetite for risk while others fell outside it. Don't penalize people when decisions go awry; learn together how to better apply risk appetite when making decisions.

Climb the ladder of inference. It's common for people to make decisions based on assumptions and faulty beliefs rather than evidence. To guard against this all-too-human tendency, consider the ladder of inference, described by business theorist Chris Argyris. The ladder of inference is a thinking process we go through, often without realizing it, to reach a decision. Here's how it works:

We start with the first rung of the ladder:

(1) the facts. Then we move up the ladder through

(2) the specific facts we choose to focus on,

(3) our interpretation of those facts,

(4) our existing assumptions,

(5) conclusions based on our assumptions about the interpreted facts,

(6) our beliefs based on prior experiences,

(7) our final decision.

Improve Your Meetings & Your Decision-Making

Decision fatigue and distracted thinking set in when the brain gets tired or overloaded. To counteract these risks:

Go Short. Take Breaks: Keep the overall duration of meetings, workshops, trainings, and other learning experiences short, and provide brain breaks between tasks and exercises. The amount of information people retain is highest during the first 30-60 minutes and plunges after that. A series of short meetings is more brain-friendly than one long meeting.

Start with the Tough Stuff: When asked how to change board meetings for the better, experts advise discussing the toughest issues at the beginning rather than during the "new business" part of the agenda. The same tip is salient for any get-together: Always put tough thinking tasks at the beginning of a meeting, workshop, or learning event, before brain fatigue sets in.

Shuffle on Down: Try shuffling the order in which you present information at staff and board meetings. This gives each part of the agenda a chance to take place while people's brains are fresh.

Give Decisions Time to Bake: Have you ever tried to rush the baking process by turning up the oven temperature? It's a mistake made by inexperienced bakers. Cranking the heat by a hundred degrees won't get the cake finished sooner, but it will increase the odds you'll need to apologize to your carb-craving guests.

When making decisions, give people plenty of time to consider options rather than forcing the issue. Weighing options, reflecting, and using logic are what Daniel Kahneman in *Thinking Fast and Slow* calls "System 2 Thinking." Such things mustn't be rushed.

If you move too quickly through that process, you apply your assumptions without considering them, thus drawing the wrong conclusions. To avoid such warped thinking, analyze your choices at each rung of the ladder, asking:

- Are we focusing on the right information?
- Are there other facts we should consider?
- Are we interpreting the facts correctly?
- Are our assumptions and beliefs correct?
- Have we drawn the right conclusions?

By being aware of how your brain reaches a decision, you can reduce your biases, inferences, and assumptions. You can learn which rungs of the ladder you tend to skip and make a conscious effort not to do so.

Don't let distraction cause you to overlook risks. In *The Power of Fifty Bits*, Bob Nease explains that we're wired to be inattentive and distracted. That's because only 50 of the 10,000,000 bits the brain processes every second are devoted to conscious thought. Regardless of how clever you think you are, most of your brain activity is on autopilot.

> "It's common to make decisions based on faulty beliefs."

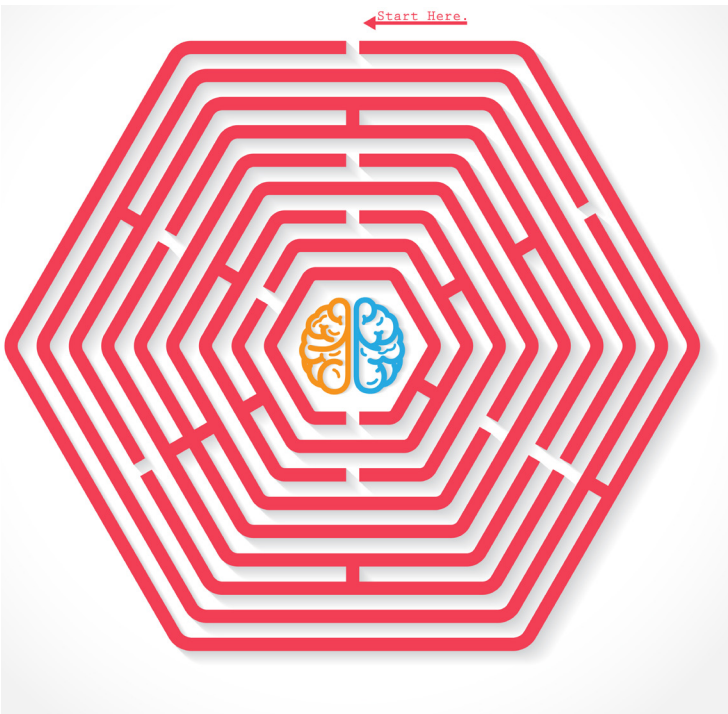
> "When we jump to the wrong conclusions, we can make fatal decisions."

Burnett explains it this way: "The brain has to pick and choose what gets noticed." The result is selective attention – a likely culprit of unnoticed red flags that precede crisis events.

When your team evaluates risks or makes important decisions, take care not to overload people's brains. Have discussions first thing in the morning when their minds are clear and they're more able to focus.

When you let people take their time and do their thinking when their brains work best, you reduce the risk of groupthink. That will increase the odds that you'll take the risks that will help you succeed (such as starting a new program), avoid the risks that can derail your organization (such as not getting the proper insurance), and thoroughly analyze every risk before decision fatigue sets in.

Melanie Lockwood Herman (melanie@nonprofitrisk.org) is executive director of the Nonprofit Risk Management Center. For insights on how understanding brain science can help you evolve risk management practices in your nonprofit, see World-Class Risk Management for Nonprofits *(nonprofitrisk.org).*



Nothing Risked, Nothing Gained

For more on risk management, decision-making, and the brain, see articles at NonprofitWorld.org:

Turn Your Stakeholders into Risk-Takers (Vol. 29, No. 4)

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

What Is the Board's Role in Managing Risk? (Vol. 15, No. 5)

Foreseeable Harm (Vol. 20, No. 3)

Seven Risk Questions for the Board (Vol. 33, No. 4)

Risk Management: Slippery Slope Or Moral Imperative? (Vol. 16, No. 30)

Overcome People's Resistance with These Steps (Vol. 38, No. 3)

The Five Biggest Teamwork Ills & How to Avoid Them (Vol. 38, No. 3)

Planning for the Unforeseeable: How Smart Risk Management Provides Peace of Mind (Vol. 24, No. 2)

Making Better Mistakes

Use this checklist as a guide to making magnificent mistakes.

By Gregory Lay

Is your organization in a rut because people are too worried about failing? It may be time to help change their mindsets by encouraging them to make mistakes.

Of course, everyone makes mistakes, but some kinds are better than others. The worst are those that people try to hide. Doing so makes it more likely that they'll repeat the error. They won't learn from it, and they certainly won't turn it into a learning opportunity for others.

The best screw-ups are the ones that lead to creative solutions. They're the ones that are shared, discussed, and used as a chance for everyone to learn, improve, and grow. Here's a checklist to help you and the rest of your team make the best possible blunders.

Dare mistakes to happen. Freezing to avoid slip-ups is not growing. Learning comes from listening to helpful feedback, and feedback comes when you're in motion. Mistakes become teachers when we recognize, communicate, and implement course corrections.

Don't kill an idea with research. It's beneficial to start a project by gathering information, but you don't need every bit of data beforehand. As soon as you have a reasonable fraction of the research results you'll need, begin your undertaking. The rest of the information will come as feedback when you're in motion. Don't worry if it involves a mistake; you're expected to make adjustments as you learn. Standing still to gather the last crumbs of information is indecision. If you wait too long, some of the results you've collected may even be outdated by the time you begin.

Analyze risks. Risk analysis isn't about avoiding risk; it's about identifying obstacles and knowing what you'll do when problems come up. Having a "Plan B" and a "Plan C" makes it more likely your exploration will carry the twin labels of "educational" and "successful."

Make bold plans. "Safe" plans have lower learning potential. And don't stick to your plan too tightly. When you see an opportunity, leap at it. Whether succeeding brilliantly or going "splat," you'll generate new feedback to enhance your learning.

> "The worst mistakes are the ones people try to hide."

> "Let errors become your teachers."

Consider values and objectives. If you plan only for immediate challenges, you'll often need to change shortsighted plans. Weigh ideas against long-range goals and organizational values, and be willing to take risks to achieve those worthwhile objectives.

Be accountable. The game is "no blame." If a risk turns out to be a mistake, take full responsibility. Spearhead the effort to correct the outcome and document what you learned. Blame turns mere mistakes into failures and ruined relationships.

Share credit. When risks lead to success with no major mistake, spread credit lavishly. That's important not only so that others will enjoy working with you. It also inspires people. It lets them feel good about taking risks that bring forth good results.

Encourage and appreciate feedback. Remember to thank people for their input, regardless of whether it was delivered kindly or soaked in vinegar. Then, let people (especially your team) know what you learned and what you'll do differently next time.

Gregory Lay is a journalist, speaker, speaking coach, trainer, and editor of a website (AccidentalCareer.com) aimed at helping people improve their workplace experience.

Think Outside the Frame

Making smart mistakes means keeping an open mind. These articles will help widen your perspective (Nonprofitworld.org):

The Joys of Risk (Vol. Vol. 28, No. 3)

Seven Ways to Be Unreasonable (Vol. 20, No. 5)

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

Opportunity's Knocking – Are You Ready? (Vol. 16, No. 5)

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

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

Turn Your Stakeholders Into Risk-takers (Vol. 20, No. 4)

A Better Brand = More Loyal Supporters

Is it time to revisit your brand?

By Isham Colosetti

Every nonprofit needs to update its brand strategy on a continual basis to meet supporters' needs. Have you looked at your brand recently? If not, here are steps to connect more powerfully with your audiences by taking a user-centered approach to brand strategy:

Begin with your internal stakeholders.

One of your most important audience groups is your internal staff. Don't change your strategy without first receiving their support. A new brand strategy often requires change in the efforts of staff members. They will sabotage your undertaking if you don't make sure they're on board.

Motivate staff by painting a picture of what success will look like. Also, create an image of what *not* doing anything looks like. Remind them in this way that the status quo is a pathway to failure. Inspire them to find ways to take part in the solution.

Perform market research.

Look closely at the people to whom you're aiming your messages. Do some research into who they are. You may find that your assumptions about them aren't backed by data.

Collect all the information you can. What you don't know about these audiences will hurt your ability to stay relevant. Ask these questions about them:

- **What do they like** to read?
- **What events** are they attending?
- **Where are they** in their life?
- **How do they interact** with other brands? What do they like and dislike about those brands?
- **How do they rate you** in comparison to your competition?
- **When did they first become aware** of your organization? If they became loyal supporters, when, how, and why did that happen?

Surveys are a good way to get general information, but one-on-one interviews and focus groups will provide a deeper dive into people's motivations, pain points, and passions. An added advantage of both surveys and focus groups is that they increase positive attitudes about your brand among those who participate in the studies. Circling back to your audience with key outcomes and explaining how the research will affect them will forge a trusting relationship.

Design a marketing plan for each audience.

Analyze your research to clarify the needs and aspirations of each of your key constituent groups. Look for ways that your organization's mission and vision intersect with those wants and needs. Then study that place of intersection carefully. Use the overlap between your organization's vision and each audience's needs to create a unique value proposition for that group.

Next, use that value proposition as the foundation for your messaging. Based on that foundation, you can create a program and compelling message tailored to each constituent group.

Create new platforms.

Reimagine the platforms you use to communicate. It's easy to go back to the tried and true methods of communicating, and you shouldn't abandon those methods, but be open to new ways of reaching your constituents. Ask:

- **Where do they spend** their time?
- **Are there other brands, services, or events** that might help you reach them?

Recognize and respect the value of social media channels in public relations and communications, especially within the millennial audience. Commit to using social media in outcome-driven ways to drive actions like donating money

> "What you don't know about your audiences will hurt your ability to stay relevant."

and sharing information. Create an info ad that generates social interest or concern. Establish a voice for your brand within these platforms and begin showcasing your expertise by commenting on key issues and interests.

Turn supporters into advocates.

Identify brand evangelists – those people who are already devoted to your brand. Turn them into advocates by doing the following:

- **Make it easy for them** to share their enthusiasm and advance your agendas.
- **Ask** for their feedback. Follow up on their input and ideas.
- **Provide as many avenues as possible** for them to circulate your story to their networks and help you spread the good news.

Isham Colosetti (isham@creative-mischief.com) is co-founder and chief marketing strategist of Creative Mischief (creative-mischief.com), an Atlanta-based marketing agency with a multi-disciplinary team of award-winning marketing professionals who work to inspire memorable brand experiences.

Looking Further

For more ideas on connecting with your audiences and revitalizing your brand, check out these articles at NonprofitWorld.org:

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

The Peer-to-Peer Fundraising Evolution (Vol. 30, No. 6)

Remember Your Brand when You Market with Social Media (Vol. 33, No. 4)

Quick & Dirty Research (Vol. 19, No. 3)

Overcome People's Resistance with These Steps (Vol. 38, No. 3)

Using Surveys & Focus Groups to Gather Market Data (Vol. 13, No. 3)

Why Telling the Right Brand Story Matters So Much (Vol. 32, No. 3)

How to Conduct Focus Groups (Vol. 17, No. 5)

Top Five Ways to Engage Donors with Social Media (Vol. 33, No. 3)

Top Can't-Miss Resources for Nonprofits (Vol. 34, No. 3)

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

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

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

> "The status quo is a pathway to failure."

Coming Up in *Nonprofit World*

- Not Connecting with All Your Audiences? Maybe You're Not Speaking Their Language
- Transform Your Communications with a VoIP Phone System
- Should You Charge for Your Services?
- Leverage Mobile to Gain More Supporters
- Icebreaker Activities to Have on Hand
- Is Your Legacy Society Dreary Or Dynamic?
- Best Practices to Budget (& Spend) for Marketing
- Avoid Transition Trauma with a Succession Plan
- Don't Fall Behind When It Comes to Recruiting

And much more ...

Are You Prepared for a Cybersecurity Incident?

Without a plan, you risk catastrophe.

By Bryce Austin

"I have been investigating a large number of failed logins on your server. Due to the volume of failed attempts, it does appear that the attempts are coming from an outside source. My organization recommends that you reach out to a security firm to have your network investigated for a possible breach."

He couldn't believe what he was reading. A cybersecurity professional was forwarded the e-mail above from his new client's computer management company. He had to figure out what to do – fast.

The priorities were simple:

1. Alert the organization's executive team about the situation.

2. Determine if this was a real hacking attempt.

3. If it was a real hacking attempt, figure out how it was occurring.

4. Assess if the hack was successful in any way. Was any damage done? Was any data accessed?

5. If the hack was unsuccessful, terminate the hacker's access immediately.

6. If the hack was successful, start making calls to the organization's CEO, their cybersecurity insurance carrier, a third-party organization that specializes in breach remediation, and the organization's attorney.

7. Follow up with root-cause analysis, and recommend preventive measures.

It took over 10 hours to determine the extent of the issue. Cybercriminals had breached a single server and introduced a malicious program. The program was trying various dictionary words as passwords against common accounts. Luckily, the malicious program had only started a few hours earlier and it seemed the bad guys hadn't yet been successful at cracking a password.

The cybercriminals gained access into that server via a combination of a phishing e-mail and a bad firewall configuration. Thankfully, forensics found no evidence of further intrusion.

Takeaways from This Real-Life Incident

The example above is real, and while it represents the best possible outcome of a cybersecurity incident, it was used here to make a number of points:

The organization didn't have a playbook on what to do when a cybersecurity incident was suspected, so solving the problem took extra time.

The organization didn't have documents outlining how to bring operations back online if the hack was successful, nor did they have procedures to follow if sensitive data had been stolen.

The organization's IT services vendor wasn't well trained in how to get to the bottom of the technical issues quickly, which lengthened the incident by hours. The organization's leaders didn't have a list of whom to call if a cybersecurity incident was suspected, which made the phone number to their cybersecurity advisor the only number they thought to use. What if he was unavailable when this took place?

In a nutshell, the organization's leaders didn't have their act together, and it could have spelled disaster.

How Your Organization Will Be Judged

After an incident occurs, your organization will be judged on the following criteria:

Before the incident, did your organization take all the precautions one would expect of a prudent organization?

Did your organization respond to the incident using procedures that one would expect of a prudent organization?

Are there ways that the media could portray your actions to make your organization appear culpable or incompetent? If so, expect that they will.

What Your Playbook Must Include

You need to create a robust playbook with the input of the CEO, legal counsel, and all other senior leaders so that you can respond quickly to an incident. Your incident-response playbook needs to spell out the following key actions:

Identify who in your organization has the authority to declare a cybersecurity incident. Who can initiate the playbook?

Clarify how much money that person can authorize to investigate an incident.

List the types of scenarios your playbook is designed to cover. Examples of such scenarios include:

- loss of sensitive data
- a ransomware attack
- loss of a critical system
- law enforcement contacting your organization about a warrant or subpoena
- inability to use your site due to a natural disaster or other issues (such as a crime taking place in the building and the police barring your employees from entering the premises).

Have a call tree that includes which people to call when an incident takes place.

Define the people responsible for deciding when to bring in law enforcement.

List the people authorized to speak to the media about a cybersecurity incident, and what those who aren't authorized to speak to the media should say if they're approached by a reporter.

Detail all your critical systems, the location of data in those critical systems, and the location of data backups for those systems.

Outline your general incident-response process. While every scenario is different, this process normally follows these steps: preparation, detection, containment, eradication, recovery, incident closure, root-cause analysis, and preventative measures.

Review these plans on a frequent basis. Such plans get stale quickly and must be reviewed whenever a major change takes place in your organization.

There's an interesting and noteworthy fact about these points: Most of them are non-technical. They're operational and financial in nature. Many organizations make the mistake of leaving their incident-response plans to their technology team. But that team shouldn't be making these business and financial decisions. Those decisions need to be made by the organization's leaders and legal counsel.

Above all, your incident-response plan needs to be tested. Unless you have rehearsed an incident-response procedure, you're only able to guess if it will work. This is too important to be left to guesses.

Key Lessons

The key messages from this article are easy to list:

Your organization needs an incident-response playbook.

The incident-response playbook should be owned by a non-technical member of your executive team.

You must periodically test your incident-response capabilities.

Your organization needs to update the playbook from lessons learned as a result of tests and whenever major organizational changes occur.

Questions to Explore

Use these questions to explore this topic further with your organization's leaders:

How do we test our incident-response playbook?

How often do we test it?

What did we learn from our last test?

Bryce Austin (info@bryceaustin.com) is the CEO of TCE Strategy(bryceaustin.com), an internationally recognized speaker on emerging technology and cybersecurity issues, and author of Secure Enough?

More on Creating Your Cyber Playbook

Find more help in preventing cyber attacks by checking out these articles at NonprofitWorld.org:

Don't Get Caught by Phishing Schemes (Vol. 35, No. 2)

Nine Surefire Steps to Lock Down Your Cybersecurity (Vol. 36, No. 3)

Hacking People: Why Your Biggest Vulnerability Isn't in Your IT Department (Vol. 37, No. 1)

Keep Your Online Identity Safe (Vol. 35, No. 4)

Seven Questions You Must Address to Thrive in the Digital Age (Vol. 35, No. 1)

Mitigate Cyber Risks with the Right Security Controls (Vol. 36, No. 1)

MIND MAPPING Is Essential for Leaders

Help people see how to reach your vision with this powerful tool.

By Hilary Jane Grosskopf

Your role as a leader is to help your team move toward your vision. You must be a great collaborator to motivate your team every day.

How can you make that daily connection? Your e-mails are easily overlooked. Your words can be forgotten right after the conversation. To give clear direction, you must communicate in a way that's engaging, efficient, and enduring. The solution is mind mapping.

So, what is a mind map? It's a visual diagram that displays information about a central topic. Mind mapping cultivates focus. It's different from other ways you communicate because it's a visual, lasting means of giving direction and collaborating.

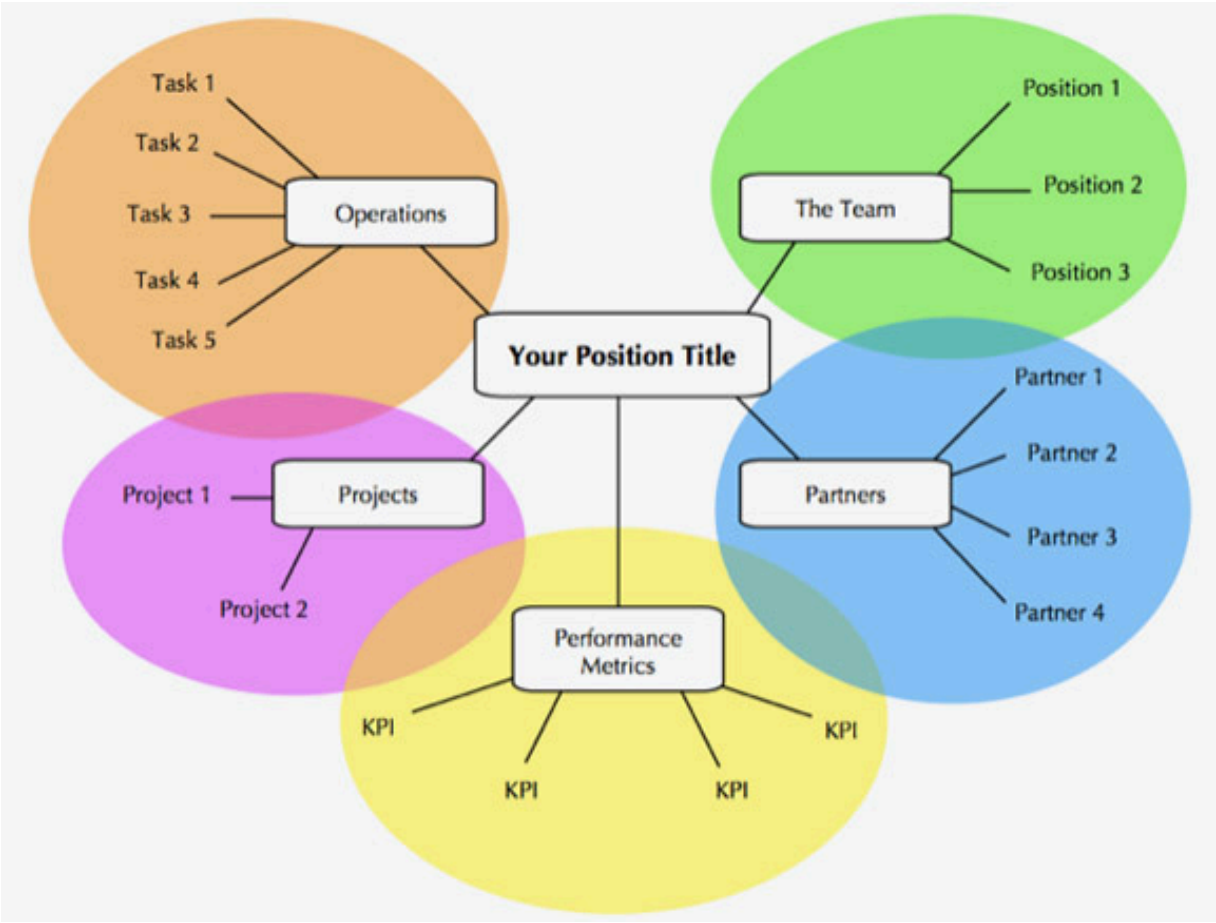
Zoom Out to See the Big Picture

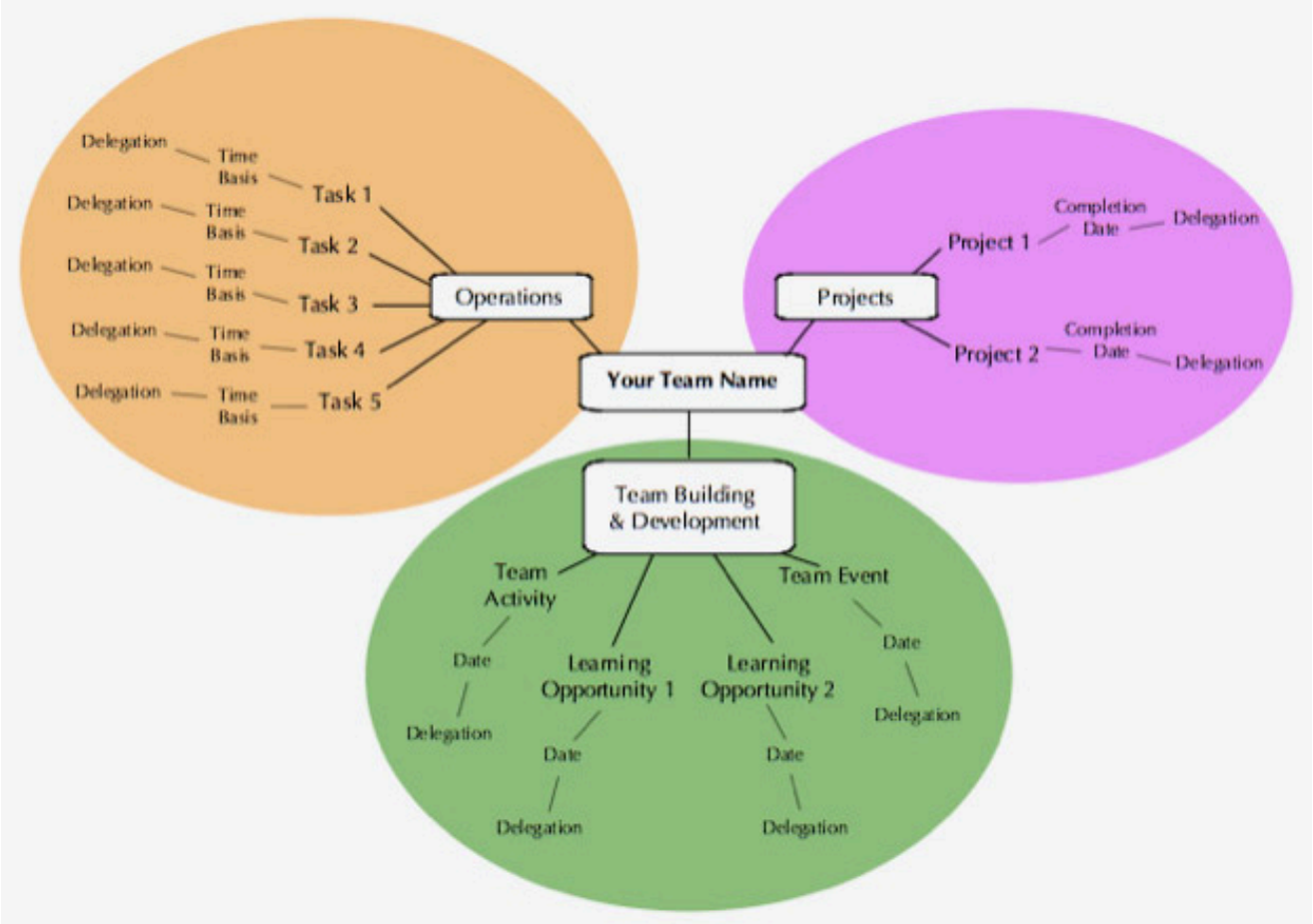
The visual quality of a mind map lets you zoom out to see the full scope of your role or the full picture of the team's work scope. Seeing the big-picture vision on one page enhances memory and conveys information quickly. The branches of a mind map develop the context around the central topic and bring the map to life.

The central topic goes in the middle of the map. To create a role map (which will clarify the full scope of your own leadership role), place your position title in the center, as shown in Figure 1.

Next, branch out from that center. Branch by creating your first layer of sub-topics around the central topic. The first layer contains all the essential aspects of the role. Continue

Figure 1: Role Map Template from *Awake Leadership*





branching the second layer of the map by detailing the tasks and responsibilities of the role.

Organize & Prioritize Your Work Scope

Mind mapping also helps you organize and prioritize. It's more efficient than creating a bullet list or holding a long meeting. Preparing a role map before a one-on-one meeting makes the review much more efficient and gives the meeting structure.

After branching to develop your role map, it's time to organize. Take a look at your map and note what you find. Could you add, remove, or combine any tasks or ideas?

Once you've completed your role map, review it with your team and enjoy the clarity of a singular, organized view of your work scope. Use color to prioritize tasks.

Collaborate & Communicate

Mind mapping can also be used for collaborative efforts. You can use a mind map in team meetings and one-on-one meetings to give direction and articulate the vision. The engaging visuals and simple format help people understand and remember the content.

> "Seeing the big-picture vision on one page enhances memory."

Figure 2: Team Vision Map Template from *Awake Leadership*

An example of collaborative mind mapping is the team vision map (see Figure 2). With this map, team members can easily see the tasks they must achieve to move toward the vision.

To create a team vision map, begin with your team's name as the central topic. Place it in the middle. Add the three essential components: Operations, Projects, and Team Building.

Continue by adding tasks, projects, and events to each branch. Use this map in team meetings and reviews to show how your vision translates to specific tasks.

Align the Team

Team alignment may be the most satisfying aspect of mind mapping. Alignment helps the team understand how the overall vision is broken down into individual contributions. Mind mapping is a great way to delegate and set timelines.

After you've created the team vision map with your tasks, projects, and events, assign tasks to team members and set timelines. A mind map's expansive nature allows you to delegate and set timelines so team members can see what they're responsible for, when it needs to be completed, and what others are working on.

Put Your Mind Maps to Use

Mind mapping is a simple yet profound tool for leadership and collaboration. The visual quality enhances focus and

memory. The central focus point makes it easy to return to the core purpose to organize information relevant to the topic. The expansive nature lets you modify the map over time.

Mind mapping is accessible no matter what resources you have. You can create your maps with paper and pen. You can map on a white board. There are also many digital resources online for mind mapping.

Leaders are more productive when they use mind mapping to clarify their role and align their team around the vision. Teams often find mind mapping more engaging and effective than tools that consume more time and create complexity. Lead with clarity and fuel collective progress with mind mapping.

Hilary Jane Grosskopf is a leadership strategist, writer, and founder of Awake Leadership Solutions (awakeleadershipsolutions.com). She is the author of two interactive leadership guidebooks, Awake Leadership: A System For Leading with Clarity & Creativity *and* Awake Ethics: A System For Aligning Your Actions with Your Core Intentions.

> **"Team alignment may be the most satisfying aspect of mind mapping."**

Find Out More

For more ways to move people toward your vision, see these articles at NonprofitWorld.org:

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

Increase Work-Group Productivity with Concrescent Conversation (Vol. 26, No. 3)

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

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

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

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

Take It Up a Notch: Using Kaizen for Continuous Improvement (Vol. 35, No. 2)

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

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

How to Overcome Your Top Four HR Challenges (Vol. 35, No. 1)

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

Useful Exercises

In her two insightful books, *Awake Leadership* and *Awake Ethics* (awakeleadershipsolutions.com), Hilary Jane Grosskopf provides concrete exercises that will help you guide and motivate your team. For example:

Use field notes to find and fill gaps in knowledge. Ask people to write down three questions each week as they go about their work. These questions can be about the organization, its systems, or anything else related to how they and the rest of the team function throughout the day.

On Friday, discuss these questions as a team and work together to answer them. It's helpful to buy people field-note journals or notebooks to make the activity official and structured.

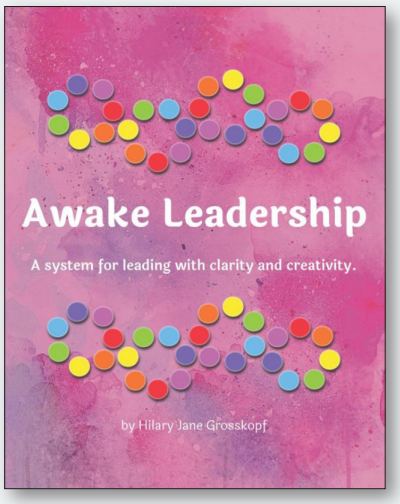
Do this exercise three weeks in a row, and if it seems helpful, continue forever! Examples of field-note questions:

- Why do we send out promotional e-mail on Mondays and Fridays?
- Who decides what training is offered? How can we give input about the training we'd like to have?

Hold immersion trips to help people understand different areas of the organization and connect with people they don't work with every day. For instance, ask staff, board members, and volunteers what areas of the organization they're curious to learn more about. Have people shadow others for a day or try switching tasks.

Plan to spend an hour mentoring each of your team members one-on-one. Ask them questions like these:

- What new skills or areas of the organization would you like to learn more about?
- What's a challenging, time-consuming process you do? How could we reduce the time and effort it takes without lessening the quality of the result? Would you like to research new tools that could make the process easier or more efficient?



Are You Risking Legal Action because of Discrimination?

Study Shines Light on Leadership Diversity

Many employees never even reach the glass ceiling because of a broken rung much lower in the ladder. What is that rung, and how can you repair it?

Women and minorities still face many barriers in attaining leadership roles. According to a study by Pinsight, "Repairing the Broken Rung" (pinsight.com), you may need to rethink which employees you choose to promote to leadership roles in your organization. The study shows that today's practices are often influenced by unconscious bias and result in unintentional discrimination.*

Many organizations identify high-potential employees – those who show potential to grow into leadership roles – and prepare them for promotions by providing them with special assignments, networking opportunities, and executive coaching, which give them a clear advantage. If women and racial minorities are prevented from accessing these opportunities, they're at a disadvantage.

*Although this study focused on for-profits, there's little doubt it's applicable to nonprofits, as many studies have highlighted the huge disproportion of white men compared to women and people of color in nonprofit leadership.

Many assume there are fewer women and minority leaders because of lower qualifications among these subgroups. But this study makes it clear that a large part of the problem is the way organizations identify potential leaders and which employees they groom for promotion.

How Do Organizations Identify High-Potentials?

When identifying high-potential employees for advancement, most organizations rely on the judgment of management. But ample research shows that managers aren't the best judges of employees' performance and potential. For example, one study found that over half of performance ratings actually reflected the person completing the ratings (the manager) rather than the employee being rated.

The study's authors found that unconscious biases (stereotypes that people don't know they have) have a great impact on managers' perceptions of who has leadership potential. These biases are then reflected in disproportionately more white men than women and

minorities being identified as having potential for leadership and thus receiving special training.

What Does the Research Show?

The Pinsight study finds that male managers are five times more likely to select men than women as high-potential employees. Female managers are two times more likely to choose men than women as high-potentials.

Glossary of Terms

Adverse impact: another term for "unintentional discrimination," which is illegal.

Adverse-impact analysis: a comparison of selection rates to see if any protected group is being disproportionately harmed.

Broken rung: term used to describe the inability of women and minorities to take the first step up the leadership ladder at rates equal to white men.

Four-fifths rule: the legal requirement that the selection rate for a protected group can't be less than 80% of that for the group with the highest selection rate.

High-potential employees: those who receive disproportionately more training and resources because of their perceived potential to grow into leadership roles in the organization.

High-potential programs: an array of experiences, resources, and opportunities, including but not limited to coaching, education, involvement in special projects, and opportunities to network, that are provided to high-potential employees.

Intentional discrimination: Employment discrimination that is done on purpose.

Protected class: Employees in a group that's qualified for protection under equal employment laws. Federal law protects employees from discrimination or harassment based on sex, race, age, disability, color, creed, national origin, or religion.

Successor: the person next in line to be promoted into a position once it becomes vacant. Most organizations invest a great deal into their succession plans – preparing people for key positions. As with high-potential selection, most organizations count on managers for these decisions, with only 8% of organizations relying on relatively more objective data.

Unintentional discrimination: Discrimination against members of protected groups that occurs even though the organization's policies may seem neutral. Even though unintended, it is illegal and punishable by law.

Pinsight's previous research found that women generally outperform men on several leadership skills most predictive of success in leadership positions. However, we see a pattern of gender disparity in high-potential programs. Compared to the distribution of gender in the employee population, we would expect half of high-potentials to be women. But in reality, there are almost twice as many men as women in high-potential programs.

Is Unintentional Discrimination Putting You at Legal Risk?

Unintentional discrimination, also referred to as disparate impact, occurs when policies that appear to be neutral adversely affect a protected class (a group that's protected by federal law against discrimination because of sex, race, age, disability, color, creed, national origin, or religion).

Intentional discrimination, or disparate treatment, on the other hand, is deliberate employment discrimination. Testing only minority applicants for a particular skill or asking women a question that men aren't asked (about childcare arrangements, for example) is intentional discrimination.

Federal laws forbid both "disparate treatment" (intentional discrimination) and "disparate impact" (unintentional discrimination). Organizations face harsh punishment if they are found guilty of either type of discrimination.

The Pinsight study found unintentional discrimination against women in almost half of organizations and against racial minorities in two-thirds of organizations. Clearly, many organizations are exposing themselves to expensive, damaging lawsuits.

Classifying employees as high-potentials is a decision similar to hiring and should be scrutinized for potential discrimination in the same way. This involves comparing the selection rates for subgroups of employees depending on their demographic status – commonly referred to as adverse-impact analysis. A common rule used by courts to decide if discrimination has occurred is the four-fifths rule. According to the rule, discrimination exists if a protected group is selected at less than 80% of the selection ratio of a non-protected group.

According to the study, only 8% of organizations base promotion decisions on objective assessment data. Since subjective HR practices are apt to cause discrimination and lead to legal punishment, it's wise to adopt objective tests, such as standardized assessments of ability, personality, and other job-relevant attributes.

> "If you don't use objective measures, you may invite lawsuits."

What Are the Study's Main Conclusions?

The study identified a vicious cycle that perpetuates itself:

- **Men hold** more managerial positions.
- **Men show unconscious bias** favoring white men when deciding who has leadership potential.
- **Managers** (mostly men) make decisions about who has leadership potential.
- **More men are identified** as high-potential employees.
- **More men receive access** to special training and resources designed to prepare them for faster promotion.

The study's authors urge you not to rely on managers to identify high-performing and high-potential employees. Instead, they say, you should turn to more objective measures of performance and potential. If you don't, you may invite lawsuits.

What Steps Can You Take to Rectify This Problem?

The study's authors identified five steps that organizations can take to repair the broken rung and ensure fairness in the development of employees.

1. GET THE DATA.

Start by obtaining data about the practices you use to identify high-potential employees. Make sure you're using objective measures, not subjective judgments, to select these employees. Use the same rigor that you apply to hiring decisions. On a regular basis, calculate adverse impact against all protected groups. Review trends and best practices as well as legal cases to assure that you're aware of risks and trends.

2. ROLL OUT BIAS TRAINING FOR ALL.

Bias training is a good starting point, but understand that it's meant to increase awareness of the issue, not solve it. You can't train bias out of people. All humans use biases to save time and energy when making decisions. What training *can* do is increase awareness of what biases exist, how they can affect decision-making, and where to look for them in high-potential selection decisions. Because most people are reluctant to see their own biases, use data from your organization as evidence that even your managers show bias.

3. TURN UP THE RIGOR.

Examine your processes for identifying high-potential employees and successors across the entire leadership pipeline, from front-line managers to senior executive roles. Notice not just how those decisions are made but exactly how the processes are executed: Do managers write down names and submit them in a sealed envelope, or is there a transparent assessment in place? Are nomination criteria clearly defined? Do you have a validated list of the characteristics needed for employees to access high-potential programs?

> "Women outperform men on crucial leadership skills"

4. IDENTIFY SELECTION CRITERIA.

Formulate the criteria for high-potential selection based on science, and insist that managers use these criteria during the nomination process. To create those criteria, ask: What attributes best predict success in leadership roles at your organization? Educate managers on these criteria and what performance should look like for future leaders. Use the criteria in the nomination and selection process, and ask managers to provide evidence that their candidates meet the criteria. Communicate the criteria to all employees to reinforce a culture of fair and consistent standards in selecting high-potential employees and in creating succession plans.

5. INTRODUCE BLIND AUDITIONS.

Help managers make better decisions by giving them more objective data about employees' readiness and future potential. Ask trained assessors with no relationship to the candidates to observe their performance. Seeing all employees in the same standardized situation and using a validated set of criteria, you will arrive at a more objective evaluation of their leadership potential and readiness.

Avoid Costly Lawsuits by Creating a Fair Workplace

Be scrupulous in rooting out discrimination that might cause legal liability. See articles such as these at NonprofitWorld.org:

The Most Likely Lawsuits – & How to Protect Yourself (Vol. 19, No. 1)

Fighting Harassment & Improving Inclusion (Vol. 36, No. 2)

The Need for Anti-Bias Policies (Vol. 22, No. 5)

How to Accommodate Disabilities under ADA (Vol. 18, No. 5)

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

The Failure of Diversity Training (Vol. 18, No. 3)

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

Don't Be Sued for Negligent Hiring (Vol. 21, No. 3)

Creating an Inclusive Workforce (Vol. 24, No. 4)

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

How to Coach People through Stress: Use Reflective Inquiry for Best Results

To lead people in stressful times, become their coaching partner.

By Marcia Reynolds

The best thing you can do for people under stress is to help them share their feelings. Giving advice does little to decrease fear.

People need to feel seen, heard, and reminded that their existence matters. This acceptance may help them feel safe enough to enter a conversation with you about perspective and possibilities.

Don't just ask, "How are you?" Show some real concern and ask something like, "How are you really doing with all these challenges?" Relax as they talk; you don't need to make them feel better. Just say you understand and appreciate why they're thinking and feeling the way they do. Once their brains calm down, you can ask if they're ready to look at actions they can take.

Focus on What's Most Real

Albert Einstein said, "Reality is an illusion, albeit a very persistent one." The less we know for sure, the more we believe the worst will happen. Emotions fool the brain. It's difficult to sort the most likely truths from imagination. But if you explore people's feelings without pressuring them, you can create a sense that the present moment is manageable.

A common mistake is to ask a lot of open-ended questions. Because our brains resist self-exploration, people reach insights better if you use reflective inquiry. Questions only seek answers. But reflecting on what people say, then mirroring your understanding back to them, leads to insight and trust.

When I coach clients, I listen for their beliefs about the present and assumptions about the future. Beliefs and assumptions calcify their stories. Pulling these notions out of the stories can soften the edges.

When I summarize the story I hear them tell, I share statements like, "Sounds like you believe (this) is happening." Or "You said you assume (this) is how the future will look. Can we sort out what else is possible?" I fill in (this) with specific phrases they shared, using their words so we can examine their thinking together.

Reflecting what people are saying helps them become objective observers of their stories. Once they see the limits of their stories, they can see other possibilities beyond the frame. This gives them a sense of control in the moment and some predictability about tomorrow.

End with Straight Talk & Suggestions

Once you explore people's beliefs and assumptions, you might have facts to share that will bring structure to their thinking. Honest communication about present conditions actually relieves stress instead of creating more. When we speak the truth in a humane and caring way, people more easily face "what is" instead of being stuck in "what-ifs."

You don't need to be a trained coach to revive a brain attacked by stress. If you let people think through their problems while you stay compassionate and curious, they'll find value in the conversation.

Unexpected shifts are always around the corner. We must seek to help each other see beyond the boundaries of the stories we're living by, especially when stress attacks us.

Dr. Marcia Reynolds, PsyD, is president of Covisioning (covisioning.com) and author of Coach the Person, Not the Problem *(Berrett-Koehler, bkconnection.com).*

> "Giving advice does little to decrease fear."

Mending People's Minds

Use coaching tools to help people deal with their emotions and find productive solutions, using articles such as these from NonprofitWorld.org:

How to Reduce Employee Stress (Vol. 24, No. 3)

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

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

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

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

How to Improve the Process of Change (Vol. 28, No. 6)

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

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

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

Push the Clear Button to Eliminate Stress (Vol. 30, No. 5)

Use Coaching to Retain the Leader's Edge (Vol. 28, No. 2)

Easing Stress in the Workplace (Vol. 25, No. 4)

Fundraising in the Age of COVID

A new report shows how nonprofits are surviving and even thriving during the ongoing pandemic. Key findings:

- **91% of respondents have managed to maintain full or some level of operations by adjusting their strategies,** increasing their social-media presence, holding virtual fundraisers, and hosting webinars and other digital events to draw new donors.
- **Most have enhanced their fundraising** in the past few months by creating new digital donation opportunities for donors (49.4%), offering new products or services (36.04%), and focusing on new donor segments (34.6%).
- **More than a third (35.32%) have applied for public support** through relief programs, subsidies, and other government assistance.
- **More than two-thirds (64.51%) are exploring partnership opportunities** with other organizations to address the pandemic's challenges.

Nearly half of respondents believe they can continue operating under current conditions as long as necessary, while 28% aren't sure, 11% worry they won't make it another year, and 10% fear they won't last six more months, according to the study by CAF America (cafamerica.org). Six in 10 organizations (59.67) are providing direct services to those affected by the coronavirus pandemic.

Good Trouble: How Nonprofits Can Lobby for Change

In this moment of turmoil and opportunity, don't forget one of your most important tools – the legal right to lobby for your cause. Andy Robinson of Train Your Board (trainyourboard.com) shares advice from Martha Collins, who notes that "the need for nonprofit organizations to advocate and lobby are becoming clearer and sharper."

Here are her four things to remember as you embrace your role as a nonprofit lobbyist and advocate.

1. Yes, it's legal for nonprofits to lobby. The IRS makes it plain: "A 501(c)(3) organization may engage in some lobbying," although "too much lobbying activity risks loss of tax-exempt status."

2. Be about the big picture. We often fight for things that benefit our organizations directly, such as the charitable tax deduction. Or we fight to maintain our property tax exemptions. "It's far more important, however, to use your organization's voice to fight for things like a livable minimum wage or access to quality healthcare for everyone."

3. Don't be afraid. A University of Oregon professor once wrote: "Fear of running afoul of your organization's tax-exempt status, or losing the support of important donors by being seen as 'too partisan or political,' may be preventing nonprofit organizations from speaking out or encouraging their members or clients to do so . . . . Yes, decisions to take action should be given careful consideration, [but] fear alone is not a good enough reason to fail to act."

4. Small steps can have a big impact. A few decades ago, a woman in Seattle decided to challenge misleading labeling on food products. It took a lot of people (and several years) to pass national legislation to address this problem, but it all began with a small group of grassroots advocates. Remember the phrase: If not me, who? And if not now, when? Build your skills, increase your courage, and sharpen your strategy.

For more, see these articles at NonprofitWorld.org:

Can You Lobby for a Cause You Believe in? (Vol. 36, No. 2)

Are Lobbying and Electioneering O.K.? (Vol. 17, No. 3)

How to Lobby without Breaking the Law (Vol. 14, No. 5)

Have You Registered under the New Lobbying Act (Vol. 14, No. 4)

The Key to Employee Happiness & Productivity

New research from Identity Realization (identityrealization.com) shows that whether working from home or in the changing, COVID-19 office, the key to good performance – and the key to success for every organization – is "happiness" powered by employee autonomy.

The survey, titled "COVID-19: The Value of a Creative Culture," explored the upsides of working from home and the elements of the old workplace that employees were missing, as well as the psychological effects of COVID-19 on feelings, performance, and function.

During lockdown, a happy employee was seen to be autonomous and connected to both friends and colleagues. Pandemic notwithstanding, these psychological engines delivered a strong sense of wellness. This, in turn, meant better engagement across the organization, less stress, higher feelings of creativity, and sustained performance.

Organizational leaders should encourage conversations, ease up on monitoring, and allow autonomy, all of which result in a happy and engaged employee, says Dr. Craig Knight, Founder of Identity Realization. "The results of the research were dramatic and found that happiness is engendered by a combination of active social and business connections, and of being allowed to manage the work flow as the employee saw fit."

"Nobody needs a pool table or 'happy hour' at the office," says Dr. Knight. "The research indicates that what they do need is trust from their employer, meaningful contact with others, and freedom of choice."

Robert's Rules of Order Updated for Board Meetings

The impact of the COVID-19 pandemic has required many boards to use a virtual meeting format for board meetings. In light of this shift, Robert's Rules of Order has been newly revised to ensure that motions, voting, and other important procedures are approached properly within a virtual sphere.

BoardEffect has updated its Robert's Rules of Order Toolkit to include the new revisions. You can find the toolkit at boardeffect.com/roberts-rules-order-guide/.

Does Your Culture Facilitate Fundraising?

From the point of view of raising funds, there are three critical aspects of your organization's culture:

1. Do you have one dominant source of revenue or multiple revenue streams? Look carefully to see whether rigid ways of thinking about funds are putting your organization at risk. The more flexible, innovative, and adaptable your fundraising culture, the more likely your success.

2. Are you inwardly or outwardly focused? If you're inwardly focused, you manage your programs with little concern about the community that surrounds you. If you're outwardly focused, you promote your organization actively through marketing, public relations, and other types of community outreach. It's important to maintain a balance between the two. To be sure that you aren't leaning too far in one direction, survey your stakeholders frequently, and listen carefully to what they say.

3. Do you regularly revisit your fundamental assumptions? Take time to ask hard questions about how the world around you is changing and how you may need to reframe your strategies and rebrand yourself for the future.

—adapted from *The Nonprofit Fundraising Solution,* harpercollinsleadership.com

A Self-Help Book for the Nation

The United States has its flaws, but is still one of the most diverse nations and has great democratic potential. Much of that potential rests in the pluralism of civil society. The nonprofit sector has the ability to act as a moderator between civil society and political action, provided we don't give in to — or even enable — the politics of fear and hate.

In *America, We Need to Talk: A Self-Help Book for the Nation* (Seven Stories Press, sevenstories.com), Joel Berg chastises the nonprofit sector for its scandals, for not serving constituents more effectively, for not advocating enough, and for failing to address the need for diverse approaches. Still, he's not willing to give up on the sector, because it holds great potential for democracy.

Nonprofits can serve as avenues to change if they learn to become better organizational citizens. Berg helps us understand why that's important and offers nonprofits a number of proposals for reclaiming their role of reflecting the public will.

—reviewed by Terrence Fernsler

Reinvent Yourself

The most successful organizations weave continual transformation into their strategies. In *The Road to Reinvention,* Josh Linkner (josseybass.com) provides exercises to help you do so:

1. Use societal trends, such as an aging population, social media changes, environmental awareness, even dining habits, to open areas for exploration. What might your customers want today that they didn't care about 10 years ago? Conduct a brainstorming session and list as many trends as you can. Mix and match them to explore new opportunities.

2. Add a secret ingredient to one of your current services. Ask: What *one* thing could we add to make this service truly special?

3. Borrow ideas from nature, art, other industries, science fiction novels, movies, or any area that inspires you.

4. Zoom in so close that you see something you've been missing all along. Or zoom out to gain a broader perspective on your organization.

5. Ask your team: "If you had a magic wand and could invent the ideal solution to solve our customers' needs, what would it be?"

How to Apologize when You've Said Something Racist

What should you do if you realize you've said something racist to one of the BIPOC (Black, Indigenous, People of Color) folks in your life? Even if it was unintentional, you must do the hard but necessary thing: Apologize.

"Many people are realizing biases and gaslighting happen to BIPOC people much more frequently than previously thought," says Jor-El Caraballo, co-founder of Viva Wellness (vivawellnessnyc.com). When we realize we've said the wrong thing, we may react by rushing to assure the person, "But I'm not racist!"

But that's defensiveness, not apology. Here's the right way to apologize:

1. Acknowledge the hurt. When people are hurt, they want to feel validated, seen, and understood. Acknowledging the hurt is the biggest part of a successful apology.

It's important to say something like, "I can tell that you're upset right now, and I'm sorry you're hurting." Acknowledging someone's pain, without qualification, can be incredibly healing.

2. Take responsibility for your specific behavior. Don't explain why you did it, unless you're asked. People usually understand why you did it – but that doesn't change how it made them feel. Don't talk about your intent. Instead, focus on the impact of your behavior.

"Apologizing isn't about explaining," Caraballo says. "It's about communicating compassion."

Resist the urge to deny that you're racist. "It's not up to [white people] to decide what's racist or biased and what isn't," Caraballo says. Listen and absorb rather than trying to control the conversation.

3. Focus on "I" statements. That looks like this: "I'm sorry I said X and hurt you. I shouldn't have said that."

Not this: "I'm sorry you're upset."

—from MindBodyGreen (mindbodygreen.com)

Change the World by Empowering Women

Sixty percent of the world's people who live in extreme poverty are women and girls. Women do two-thirds of the world's work but earn only 10% of the world's income. Nearly two-thirds of children not going to school are girls. It's clear that improving opportunities for girls and women can go a long way toward ending poverty and hunger. That's why CARE has turned its attention to women helping women.

Leading With CARE: How Women Around the World Are Inspiring Businesses, Empowering Communities, and Creating Opportunity (josseybass.com) contains tales of how microloans and educational opportunities have helped women become self-sufficient. When given the opportunity, these women went on to build community, conserve the environment, and remedy social injustice.

Building self-sufficiency means addressing the reasons for poverty and not imposing solutions. This book is a valuable lesson to leaders who are interested in building enduring change from the bottom up and who are patient enough to understand that it begins with small, often subtle, efforts.

—reviewed by Terrence Fernsler

Combat Problems with No-Excuses Leadership

Nonprofits are facing a rocky time. But they must be careful not to let uncertainty and disruption become an excuse for failure, says Troy Nix (troynix.com), a motivational speaker and author of *Eternal Impact: Inspire Greatness in Yourself and Others.*

No, you didn't create the circumstances that led to today's challenges, but it's your responsibility to get your organization and your people through the situation you now face. To be successful in the coming months, he says, leaders need to do the following:

Set an example. Ultimately, you would like everyone in your organization to take responsibility and refuse to make excuses. "But you can't expect that of others if you aren't willing to set the example and claim responsibility yourself for any failures," Nix says. The best leaders never point a finger at anyone but themselves. Setting an example will have a constant impact on your employees, and they'll know they can rely on you.

Do a little introspection. If you feel the urge to make an excuse for any failed performance, look inward instead and ask yourself the following questions:

Could I have acted differently to prevent this outcome?

What could I have done to better improve the end result?

How did my actions or inactions play a part in the failure?

"I guarantee that if you do this and are honest with yourself," Nix says, you'll find errors, disappointments, and fiascos that link directly back to yourself.

Take ownership. People don't understand just how much they affect others when they decide to take responsibility for any and all actions. "We must own what we do, and we have to own what others under our command or influence do, even though it might be miles away from us and somebody else is executing the plan," Nix says. "When you get up every morning and look at yourself in the mirror, are you owning what you're doing, or are you making excuses?"

Whenever you're leading an organization, the ultimate responsibility for any failure is yours. "It may be because you failed to train people properly or because you failed to hire the right person. It may be because you failed to develop a proper strategy or because you failed to develop the right culture," Nix says. "It's ultimately your failure, and no excuse can ever absolve you of the responsibility of personal ownership."

Using Language Thoughtfully in a Complex Environment

The words we use are important. They express our fundamental beliefs and show us if we're truly working for the change we desire. When used or misused, words and phrases shape our attitudes and behaviors. A language steeped in war (war on poverty, war on drugs, war on crime, trade wars), competition, and authoritarianism, for example, will normalize distance and "othering" and either/or, win/lose behavior. Such words make any efforts we take toward justice more difficult.

Questioning how we use words is exactly what Marilyn McEntyre asks us to do in *Speaking Peace in a Climate of Conflict* (Wm. B. Eerdmans Publishing, eerdmans.com). It's critical to the work of our organizations to take the time to carefully consider how our language changes the world – or doesn't. Each of us, individuals and organizations, can shift how we approach wicked problems through the words and phrases we use.

- **Does the term "climate change"** connote a distant phenomenon over which we have little control?
- **Does the word "racism"** water down damaging concepts such as white supremacy?
- **"Freedom"** has become associated with individual liberty to do what each person wants, but the great thinkers associate freedom with imagination.

Art helps free the imagination. McEntyre encourages us to consider how artistic expressions can edge us out of our comfort zones. She also addresses euphemisms and metaphors, exploring their original meanings, how they have evolved, and how we can claim or reclaim them. She considers the value of humor as an important component of communication.

She reminds us that we don't need to map how to communicate for all situations. What we do need to do with more frequency is consider how we communicate specificity and clarity in each context. Our words and phrases determine how well we're co-evolving with the complex environments in which we operate. Language, McEntyre explains, is a crucial tool that can bring about the justice our organizations seek.

—reviewed by Terrence Fersler

Responding to the Need for Continual Learning

There are many higher-education programs in nonprofit management. Students in these programs gain an understanding of the tools nonprofits use to serve their communities. The growth of these programs in the late 1990s led to the formation of the National Academic Centers Council (NACC) to support those studying the nonprofit sector. In 2015, NACC released curricular guidelines, and now Edward Elgar Publishing (e-elgar.com) has published a guide for instructors who teach nonprofit management and leadership.

The book, *Teaching Nonprofit Management*, is useful for practitioners as well. Nonprofit leaders can adapt the exercises for their team members and focus on their organizations' particular needs by selecting the relevant chapters.

Each chapter's author is an expert in a particular field of nonprofit management (fundraising, finances, marketing, strategy development, communication, and so on). The guidebook does a good job of explaining how these fields interact with one another. Critical thinking, opportunity costs, and systems approaches are key elements in understanding how all the aspects of nonprofit management interact, and this book offers suggestions and tools to generate these connecting principles.

All nonprofits share some fundamental challenges, and *Teaching Nonprofit Management* presents ways to optimize standard practices. Each organization has unique concerns, so the book also acknowledges the diversity of nonprofit organizations and the changing environments in which they operate, leaving space for (and often encouraging) adaptive practices. As our social environment changes and nonprofit needs evolve, this book can serve as a compass to help organizations become sustainable or regenerative organs of their communities.

—reviewed by Terrence Fernsler

What Not to Do

What you *don't* do is often as important as what you *do*. That's why "Not-to-Do" tips are an integral part of Karen Eber Davis's *Let's Raise Nonprofit Millions Together* (kedconsult.com). Here are a few:

Don't ask people to fundraise. Instead, ask them to "help grow the community" or "invite people to get involved" or "find out what people value." Or make a specific request: "Will you issue six invitations to your friends?" Why? What you mean by fundraising and what others hear can be worlds apart.

Stop saying, "Thank you, and." Your gratitude shouldn't be a prelude to another request. Express your appreciation and stop. Allow your gratefulness to stand out. When you leave space, your recognition will be savored.

Don't train too much at once. Focus on building one skill or explaining one important concept at a time. And, be sure to reinforce what you already taught. None of us can absorb – or retain – as much as we might hope.

Never use long words or long sentences when short ones will do. Practice brevity. Use these short sentences often: Thank you. Got it. Wonderful.

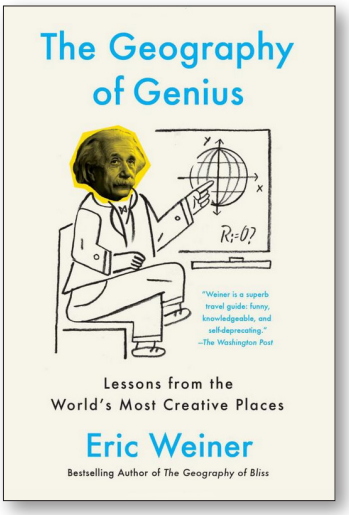
Don't expect an immediate response. If you've asked someone for something – to give money, join your board, or connect in any way – practice patience. Mentally remove yourself from wanting an answer *now*. You'll turn people off if you seem to be stalking them or being overeager.

Quit dead-end conversations. Avoid ending conversations, correspondence, or any gathering without a next step. Instead, outline what's next. Replacing dead-ends with next steps generates forward movement.

Don't hold long board meetings. Cut your agenda in half. Focus on critical items. Pick your top points. Save the rest for another time – or never (many issues resolve themselves).

How to Foster Creative Breakthroughs

What makes a genius? Eric Weiner dissects this question in his fascinating book *The Geography of Genius* (Thorndike Press, gale.com/thorndike) and concludes that genius has more to do with environment than heredity. The following tips have been connected to ingenious ideas, innovation, and creativity throughout the ages:



Take a walk. "Many a genius has done his or her best thinking while walking," Weiner asserts, citing research showing that creativity levels are "consistently and significantly higher" for walkers versus sitters. This research measured divergent thinking – the type of thinking that leads to unexpected solutions. Convergent thinkers are trying to find one correct answer to a question, while divergent thinkers reframe the question entirely.

To encourage innovation, focus on intrinsic motivation. Studies show that people are most creative when they aren't motivated by rewards or evaluations (extrinsic motivation). The most ingenious solutions come when people are motivated by enjoyment, satisfaction, and the challenge of the work itself.

Empathize with suffering. A disproportionate number of geniuses have lost a parent at a young age. This fact echoes studies that show the importance of embracing the dark as well as light sides of life. Creativity requires you to be open to all aspects of human existence and be willing to face the pain so that you can transform it into something beautiful.

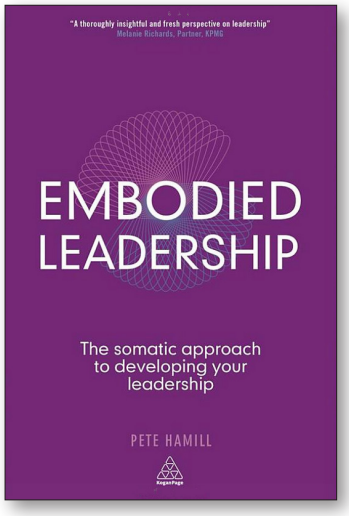
Welcome the views of outsiders. The more amenable you are to diverse ideas, the more creative you'll be, Weiner tells us. Psychologists have identified such openness to diversity as the single most important trait of exceptionally creative people.

Become a Mind-Body Leader

Cutting-edge research points to an integral connection between your body and mind. To be the best leader possible, you need to use both, as Pete Hamill makes clear in *Embodied Leadership: The Somatic Approach to Developing Your Leadership* (KoganPage Press, koganpage.com). He lays out these steps to using your body and mind to develop authority, presence, and impact as a leader:

1. Learn the Centering Technique.

- ***Stand up*** with your arms at your sides. Imagine someone is pulling on a hair at the top of your head. Let your spine stretch upward. Be careful not to raise your chin.
- ***Relax your body,*** starting with the top of your head, moving down through your forehead, eyes, jaw, shoulders, chest, stomach, legs, and feet.
- ***Balance your weight*** on both feet equally and between the heels and balls of your feet.
- ***Take some deep breaths,*** bringing the breath right down into your stomach and breathing out fully. Bring your attention to your body's center of gravity – the place on your body where your weight is most concentrated. Notice what you feel from that center.



- ***Practice this technique.*** For a week, every time the phone rings, center yourself using the steps above. At the end of the week, notice what a difference this has made in your life.

2. Make a Declaration.

Answer these questions aloud (ideally with a partner): What is your life's purpose? What are you committed to achieving as a leader? Form your answers into a statement of what you're committed to. Practice speaking this declaration (aloud or to yourself) whenever you center yourself throughout the day. Share it with others and have them help you make it real.

3. Connect to Your Body.

Find a good massage practitioner, and set up regular appointments for massage or body work. During this work, notice where you hold tension, and practice relaxing those parts of your body and breathing deeply and mindfully. Also, spend 10-20 minutes a day sitting quietly and paying attention to your breath. Such practices will accelerate your development as a leader.

4. Get to Know Your Conditioned Tendencies.

Spend time becoming familiar with your reactions when you're knocked into a stress response. Becoming aware of how you react in stressful situations will help you center yourself more quickly in response. In addition, you'll develop your ability to be more effective in conflict situations.

Throw Out Those Old Fundraising Models

For too long, fundraisers have been wedded to inefficient models, according to Greg Warner of MarketSmart (imarketsmart.com). "Why has this sector clung to its failed strategies?" he asks. The answer, he believes, is that "too many fundraisers listen to bad ideas from consultants and people with big megaphones but no real-world experience."

His book *Engagement Fundraising* uses research, case studies, and cutting-edge technology to help fundraisers cultivate the best donors for long-term success. Engagement fundraising is about engaging people rather than soliciting money. It's about conversations, not transactions. Warner makes many smart suggestions, including:

Target passionate donors who are most likely to deliver large gifts. Legacy gifts and major gifts can come from anyone, not just those "moved up" by your organization. So forget the concept of moving people up the pyramid from small to large donations, and, instead, focus on those most likely to give larger amounts in the first place.

Use surveys not only to gather information but to give people the chance to offer feedback. People love to share their opinions, and it's a great way to boost engagement. As one fundraising expert put it,"If you want advice, ask for money, but if you want money, ask for advice."

Leverage technology to learn what your most engaged supporters want and then to involve them on their own terms, deliver personalized experiences to them, and relate with them in meaningful ways.

Remember the pereto principle, which states that 80% of your revenue will come from 20% of your donors. Nowadays, it's closer to 90% of your revenue coming from 10% of donors. So, you should be using your budget to provide tremendous value to those 10%. There's no point spending money on acquiring new, low-level donors who don't have enough interest, are disengaged, and lack the capacity to make impactful donations.

Learn why people care, and then give them something of value. Adopt an attitude of giving to donors with no expectations of getting anything in return. High-capacity donors want to give. But if they're not getting the value they deserve, they'll leave.

Track and measure your donors' engagements with your organization online. The more they engage, the more they'll give. When their engagement reaches a certain level, offer them the chance to make a major and/or planned gift. They'll be glad you did!

Communicate for Success

Your communications success depends on your organization's culture, as Sarah Durham explains in *The Nonprofit Communications Engine* (Big Duck, bigduck.com). If your culture isn't about communicating well internally, your organization won't communicate well externally either.

In a healthy culture of communications:

All staff view communications as vital.

Everyone collaborates to achieve communications that express the organization's values.

Communication is inclusive and equitable. Many organizations have racialized and gendered divisions of labor, with women and minorities in subordinate – rather than leadership – positions. Such a workplace creates power-related tensions and destroys healthy communication.

Empathy is a core part of the culture. People work to understand one another, and compassion is built into decision-making and interactions.

The organization's voice is clear, credible, compelling, and consistent.

Your communications engine doesn't depend on just a few people. It can function independently. That means that there are written workflow documents to help new people quickly get up to speed. When one or two people control all communications, there's a risk of failure when they're no longer part of the team.

The organization engages the right people to take action. These people are committed to your mission and goals.

The organization is clear who its target audiences are, has a strategy to engage them, and has solid plans to implement that strategy.

The organization has the tools – the brand elements, content, media, software, and other resources – needed to communicate effectively.

The organization gathers data and seeks feedback to get smarter and communicate better.

The Nonprofit Communications Engine includes an excellent self-assessment tool to help you evaluate your own culture and decide where you need to improve. The book also provides a useful framework to put those results into action.

Beyond the Briefs

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

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

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

How to Run the Perfect Board Meeting – While Inspiring Board Members to Raise Funds (Vol. 36, No. 4)

Cracking the Diverse-Income Code (Vol. 35, No. 1)

End Excuses, Add Action (Vol. 38, No. 2)

Push the Clear Button to Eliminate Stress (Vol. 30, No. 5)

Why Focus on Bequests? The Facts Tell the Story (Vol. 36, No. 4)

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

What Followers Want from Leaders: Capitalizing on Diversity (Vol. 25, No. 5)

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

How to Tap into Purpose to Motivate People (Vol. 38, No. 2)

From Government Funds to Income Diversity: A Map For The Quest (Vol. 35, No. 4)

Has Your Organization Lost Its Soul? (Vol. 28, No. 3)

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

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

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

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