april / may / june 2021

second quarter

volume 39 · number 2

Nonprofit World

Advancement Through Sharing

Spark New Ideas Throughout Your Organization

38th ANNIVERSARY ISSUE

PLUS:

- Life after the Pivot: Refresh Your Organization
- Preparing for #GivingTuesday: Questions to Ask before You Participate
- Say Yes to Solving the Problem
- Are Your Training Goals in Alignment? Four Keys
- Get Closer to Supporters than Ever Before
- How Can You Write a Compelling Query Letter?
- Your Board Can Help You Gain Major Gifts
- Ramp Up Your Mailing List to Reap More Funds
- Partner with a Business to Gain Income

... and more

Published by SOCIETY for NONPROFITS

Advancing the nonprofit world together

Publisher

Society for Nonprofits
Purpose: Society for Nonprofits is a 501 (c) (3) nonprofit organization. Through *Nonprofit World* and other communications with its members, the Society is dedicated to bringing together those who serve the nonprofit world in order to build a strong network of professionals throughout the country.

NONPROFIT WORLD is published quarterly and digitally at no charge to members of the Society for Nonprofits. To become a member of the Society, write: Society for Nonprofits, P.O. Box 510354, Livonia, Michigan 48151. Telephone: 734-451-3582.

Membership: $129.

ISSN 8755-7614.

E-mail: info@NonprofitWorld.org

Web page: nonprofitworld.org

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

FEATURE STORY

To keep up in a world that's changing minute to minute, you need the most creative ideas you can find. Where to look? The answer is right in front of you. **"Spark New Ideas Throughout Your Organization" on page 14** offers details.

contents

volume 39 · number 2 · 2021

38th ANNIVERSARY ISSUE

ARTICLES

SOCIETY *for* NONPROFITS
Advancing the nonprofit world together

NONPROFIT WORLD **is published by the Society for Nonprofits.**

DEPARTMENTS

Start with the Right Question

Can a question be "beautiful"? If so, what separates a beautiful question from other types of inquiry?

Warren Berger is adamant that beautiful questions exist and that you can sort them out and use them to come up with meaningful change. In his book *A More Beautiful Question,* he explains why some questions lead to transformation while others result in inertia or frustration.

In a way, we live in an age of constant questioning. How many times a day do you Google queries – everything from the date of the next concert to the address of the nearest Italian restaurant? But those aren't the beautiful questions that Berger has his eye on.

The idea behind his book came from asking questions and then testing them through a blog, in which he asked for input from others (one of the crucial steps in inquiry – asking "How might we do this?" and turning insight into action). He started his blog with this definition: "A beautiful question is an ambitious yet actionable question that can begin to shift the way we perceive or think about something – and that might serve as a catalyst to bring about change." From his research on successful organizations, Berger knew that the best innovators were the ones who grappled with such questions.

For examples of what to ask, and how best to ask it, take a look at "The Power of Inquiry" on page 30. As these examples show, it's important to ask the right questions, in the right way, and in the right order – and then to act on them, for a question can't be deemed beautiful unless it leads to positive change.

Don Rothstein, cofounder of the Right Question Institute (rightquestion.org), a nonprofit formed to help people ask better questions, says, "Questions produce the lightbulb effect." That's especially true if you're careful not to rush the inquiry process. "Put Your Intuition to Work" (page 30) describes how you can create epiphanies by letting your unconscious work its magic. The boldest solutions come when you give the questions time to marinate, when you "live the questions," as Rainer Maria Rilke once put it.

It's not uncommon to get into trouble because you were asking the wrong question all along. Often this happens because you're too far removed from the problem you're trying to solve. To avoid this, it helps to ask questions "up close and in context" – what Berger calls "contextual inquiry," which relies on listening to people close to a problem and responding with empathy. Jacqueline Novogratz, founder of the Acumen Fund, which seeks innovative ways to tackle poverty, notes the importance of spending time in the communities you serve. Listen "with your whole body," she urges, as you ask people questions about their lives, their needs, and their longings.

> "Listen with your whole body."

Like questioning, listening is more complicated in practice than it seems in theory. It's not enough to listen. You must be sure others are listening to you and receiving the message you intend. "Seven Kinds of Listeners & How to Approach Them" (page 22) offers pointers.

The very idea of creative questioning implies collaboration – people to do the asking and others to help supply answers. Disruptive inquiry – generating a wide variety of questions, including ones that may seem crazy and off-the-wall – is a staple of creative problem solving. (Check out "Spark New Ideas throughout Your Organization" on page 14.) A variation of brainstorming that Berger calls "question-storming" may be especially fruitful. Research shows that when people come together as a group and throw out as many questions as possible, they're able to think more creatively than if they try to draw up a list of ideas.

Most leaders understand that insights are most likely to arrive when you ask questions, yet few encourage questioning in the workplace or provide formal training in how to ask the right things. Training is an essential piece of the picture (see "Are Your Training Goals in Alignment?" on page 18). It's also vital to make questioning a priority and model the behavior yourself. The world is too uncertain, fast-changing, and turbulent to do otherwise.

Jill Muehrcke

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. **Schedule a "storming" session** to solve a problem or come up with a new idea. Read "Be a Better Stormer" (page 15) first.
2. **Plan a time to play the "prospect game"** to help board members identify major-gift prospects ("Your Board Can Help You Gain Major Gifts," page 8).
3. **Take the first step** toward creating a marketing advisory group, as detailed in "Get Closer to Supporters than Ever Before" (page 20).
4. **Consider partnering** with a corporation to raise funds (page 12).
5. **Refine your training plans,** using the tips in "Are Your Training Goals in Alignment?" (page 18).

What Can You Do about a Bounced Donation Check?

What are your options if a donor's check is returned for nonpayment?

Q I'm on the board of a 501(c)(3) nonprofit. A few donors have written donation checks that have been returned by the bank for insufficient funds or were written on a closed account. Since donations are voluntary, we don't need to ask for payment on the check amount. However, may we collect the bank fees that we were charged for the returned check? If so, how do we go about it?

A State laws vary on handling bounced checks. You may want to talk with a knowledgeable lawyer or perhaps your bank on what the rules are in your state.

In most cases, it's a good idea to promptly notify the person whose check has bounced and ask for it to be made good. Put this notice in writing in case you need to pursue collection in court later on.

Simply because the payment was a voluntary gift doesn't mean that you don't have the right to cash the check you were given. You are probably also allowed to add a bad check fee to the payment, the amount of which is often set by state law.

"State laws vary on handling bounced checks."

Obviously you don't have to pursue your legal rights to the fullest, but I would let the donor know that the check bounced and ask for a new check and at least your out of pocket costs for the donor's error. It may have been an innocent mistake. If a friendly request doesn't work, you can consider what further you may want to do.

It would be interesting to know whether other organizations have a policy on this. Having a policy in advance always helps to remove the likelihood that the decision will be based on the individuals involved.

Don Kramer, Nonprofit Issues, nonprofitissues.com

How Can You Write a Compelling Query Letter?

Many funders make decisions based on the query letter alone. Be sure you make a good impression.

Q We're applying for a grant, and the funder requires us to write a "letter of inquiry." Can you give us some advice about how to write such a letter?

A First, complete your full proposal. Your query letter should be a summary of your proposal, highlighting your goals, showing how well your project addresses the funder's priorities, and making it easy to see what's engaging about your project.

Some tips:

Keep it brief, no more than two pages. The letter should be roughly 1/4 about your organization and your fit with the funder, 1/4 about the need you plan to meet, 1/4 about the proposed work, and 1/4 about the budget. Make sure the amount you're requesting is easy to locate, perhaps making it boldface.

Avoid the words "we need." Focus on the needs of your beneficiaries and community, not your organization's needs.

"Avoid the words "we need.""

Stick with active voice ("we will complete") rather than passive voice ("the project will be completed").

Use simple, easily understood words. Avoid jargon. Many funders are tired of overused phrases such as "at risk" or anything ending with "-based."

Let the reader feel your enthusiasm and passion (without overdoing it).

–Susan Howlett & Renee Bourque, authors, Getting Funded *(wordandraby.com, susanhowlett.com, brightstarconsultants.com)*

Preparing for #GivingTuesday: Questions to Ask before You Participate

Does #GivingTuesday fit with your plans? If you're not sure, ask yourself these 10 questions.

By Terrie Temkin

It's never too early to start thinking about #GivingTuesday. But first, ask yourself this: Is #GivingTuesday right for your organization? If you're not sure, you've come to the right place. Before you plan a #GivingTuesday campaign, ask yourself these 10 questions:

1. Are you willing to invest up to six months of preparation into your campaign?

Successful campaigns, whether on #GivingTuesday or not, don't happen overnight. You must be willing to invest the necessary staff time. Preparations for #GivingTuesday should start in the late spring or early summer, and you should be thinking about it all year. There's nothing harder to watch than a #GivingTuesday campaign that consists of only one half-hearted tweet, an underwhelming Facebook post, and a generic e-mail or two.

2. Do you have the tools to succeed?

Do you have the ability to create e-mails on the fly? Do you know who is opening your e-mails and what links they're clicking? Do you have the right database to easily track your #GivingTuesday donors? Can you track who is talking about you on social media? Can you segment and personalize your communications? These are just a few questions you should be able to say yes to.

3. Can you and your team be creative? Will you dare to do something different?

#GivingTuesday is getting more and more popular each year. It is getting hard to be heard above all the noise. You must dare to do something different to grab people's attention. If you aren't upsetting a couple of people on #GivingTuesday, that is a key sign that your communications are too bland.

4. Are there at least 25-50 people (other than board and staff) who are willing to be vocal ambassadors for you on #GivingTuesday?

If you take nothing else away from this article, understand this: #GivingTuesday is pointless unless you have a core group of people who are willing to be ambassadors for you leading up to and on the day of #GivingTuesday. These ambassadors should be people who are prepared to ask their friends, family members, and colleagues to support your organization on #GivingTuesday.

> "If you aren't upsetting a couple of people, your communications are too bland."

5. Are you willing to call every single person who makes a gift on #GivingTuesday within 48 hours?

The key to a successful #GivingTuesday is stewardship – what you do in the days following this widespread day of giving. People will likely be giving to multiple organizations. The best way to differentiate yourself is how you thank your donors and how you communicate their impact on their community (not your organization). Think about reserving two hours late in the day for everyone on your staff to call and thank the people who made a #GivingTuesday donation that morning and afternoon.

6. Do you have a documented donor stewardship plan?

There's no point in acquiring new donors on this special day if you're just going to throw them into whatever mass communication cadence you already have planned in December and beyond. If you don't have a documented plan in place to steward them – a plan that is *just* for them – you run the risk of generating negative ROI from #GivingTuesday donors who never give again.

7. Can you make your work relevant to a broad audience?

On #GivingTuesday you should be reaching out to new audiences. As a result, you need to ensure that you're appealing to as broad an audience as possible when you communicate your work and your mission. Not everybody will fall in love with the particular work you do. However, a lot of people will appreciate your work and might be willing to give if you tell how your work impacts their lives. For example: If you're a youth-serving organization, don't focus on how a gift will impact Sally Student's life. Show how supporting 1,000 Sally Students will make your community a better place to live, work, and play.

8. Do you have a reason for people to give other than #GivingTuesday?

Asking people to give *because* it's #GivingTuesday isn't enough. Line up a series of matching gifts that you can

> "Can you track who is talking about you on social media?"

announce throughout the day. If possible, connect a gift to a program goal so donors feel they're having an impact on your mission and the community by making a gift. Make it about the mission, not the giving mechanism.

9. Do you have the support of every board member and the commitment of everybody on staff?

More than any other fundraising campaign, #GivingTuesday's success lies on the shoulders of every staff and board member. If they aren't willing to donate, how can they ask others to give? Your #GivingTuesday won't be successful without staff and board contributions. Don't embark on the campaign without that support lined up.

10. Do you have a strong social-media presence and a robust e-mail list?

This is the least important of the 10 questions. While a strong social-media presence will help you reach more people on #GivingTuesday, all the tweets and Facebook posts in the world probably won't equal the impact of five great volunteers making personal asks to five dozen people in their network. People give to people, after all!

Terrie Temkin, Ph.D. (terriet@nonprofitmanagement solutions.com), is the founding principal of CoreStrategies for Nonprofits, Inc. and editor of You and Your Nonprofit Board: Advice and Practical Tips from the Field's Top Practitioners, Researchers and Provocateurs *(charitychannel.com).*

More Fundraising Wisdom

Deepen your insight with these articles at NonprofitWorld.org:

- **Crowdfunding Success for #GivingTuesday and Year-End Fundraising** (Vol. 35, No. 3)
- **How to Keep from Losing Donors: A Self-Assessment** (Vol. 35, No. 1)
- **Fourteen Steps to Better Fundraising** (Vol. 35, No. 4)
- **This Is How It Feels when You Don't Acknowledge a Donor** (Vol. 37, No. 3)
- **The Peer-to-Peer Fundraising Evolution** (Vol. 30, No. 6)
- **Deeper Donor Relationships = Increased Contributions** (Vol. 26, No. 4)
- **Online Strategies for Year-End Fundraising** (Vol. 31, No. 3)
- **Turning the Direct Ask into Gold** (Vol. 30, No. 1)
- **How to Foster a Positive Funding Relationship** (Vol. 32, No. 4)

Virtual Fundraising Ideas

Open your Auction to Everyone

Bring online shopping to life with a multi-day auction that even far-flung supporters can attend. One nonprofit raised even more money than their in-person event using ReadySetAuction virtual auction software (readysetauction.com) to rack up bids online leading up to the event. They ran their live auction during the last night of the event when guests could compete with one another to score the final winning bid. See "Your Virtual Auction Planner" at donorperfect.com. It's packed with guidance on event prep and easy-to-use tech, creative ideas to involve participants in your program, and helpful tips from experienced fundraisers.

Hold a Socially-Distanced 5k

Invite supporters to lace up and run for the good of your mission no matter where they live. One nonprofit launched their virtual 5k with printable bibs and asked participants to share photos of themselves wearing them. To their surprise, people sent in photos from all over the world. The organization promptly shared the photos on social media as they came in and stitched them together to create a video that they sent to everyone on their e-mail list when the 5k concluded. These and other virtual fundraising ideas are available from Donor Perfect, donorperfect.com.

Put on a Mission-Minded Fashion Show

If NY Fashion Week can catwalk onto the computer screen, so can your annual fashion show. Here's how you can pull it off safely without sparing any glitz:

- Line up models six feet apart in a local facility or outdoors and live stream the runway show. Or have models show off their designer duds from home.
- Don't omit swag bags for your supporters. Deliver them!
- Host a live auction after the runway show using auction software that enables guests to bid in a flash from their phones or computers.

Ramp Up Your Mailing List to Reap More Funds

Target donors for more effective fundraising.

By Rachel Flanagan

If you call the people on your donor list, 25% of your donors will give more money, studies show. If 25% of your donor base is 5,000 donors, and each of them gave $50 more, that would be $250,000. That's real money!

But fundraising efforts like this depend on your target donor list. Contact information needs to be kept constantly up to date. That can be a real challenge when resources are already limited.

Online tools like Whitepages (whitepages.com) can help you search for mailing list members' missing contact info such as current addresses, phone numbers, e-mails, and more. In addition, below are some simple tips to help ensure that you're reaching the right audiences and that your contact lists are updated and accurate.

On your website's home page, include a way for visitors to sign up for updates (or to receive an e-mail newsletter and other content) by providing their name and e-mail. Make sure it's easy for visitors to respond to this call for action. You may also want to include it on high-traffic pages, including "About Us" and "Contact Us."

Ask people to select the type of information they'd like to receive. Online forms to gather e-mail and other contact information can include lists where people can select the content that matters to them most: fundraising events, volunteer opportunities, press releases, media articles, and more.

> "Ensure that people receive the information most relevant for their needs."

Gather geographic information. These online forms can also include geographic information, which can help you tailor mailings based on people's location. This information can be particularly useful when you want to invite people to attend local and regional fundraising events.

Gain permission. One important reminder about e-mail marketing is to make sure that you gain clear permission during the signup process. New subscribers should be aware of exactly what e-mails they're signing up for. Gaining permission not only helps build relationships but in some countries (including the U.S.) it's legally required.

Segment your list. Target the right person with the right information.

Just as you might group your personal contact list into different groups (close friends, family, co-workers, etc.), it's important to segment your nonprofit's mailing list to

> "Tailor mailings based on people's location."

ensure that people receive the information most relevant for their needs. Some suggestions for ways to segment a list could include:

- active members
- inactive members
- active donors
- first-time donor vs. repeat donor
- member to donor track
- volunteers
- members by interest
- how members were acquired (e-mail, website, fundraising event, etc.)
- demographic information (location, age, etc.)
- activity-based (specific campaigns or interests).

Offer a bonus or reward for joining your mailing list. Providing access to premium online content like white papers or e-books, or physical items like a tote bag or bumper sticker, can encourage website visitors and potential donors to share their contact information and join your mailing list. In one example, it was found that offering a free online course in addition to signing up for a newsletter increased conversion by 47.2%.

You don't have to reinvent the wheel with entirely new information when offering content as a reward. Existing resources like blog posts, Q & A's, and case studies can all be repurposed and given new life for other audiences.

Rachel Flanagan manages corporate branding and recruiting at Whitepages (whitepages.com), an identity verification provider and people search engine that helps you contact, research, and verify people in your world.

More Ways to Raise Funds

Increase your fundraising efforts with these articles from NonprofitWorld.org:

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

Improve Your Direct-Mail Outcomes With Advanced Analytics (Vol. 38, No. 2)

Harnessing the Internet to Raise Funds (Vol. 31, No. 2)

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

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

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

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

Your Board Can Help You Gain Major Gifts

Your board holds the key to major gifts. Here's how to enlist their help.

By Gail Perry

When you ask board members to identify major gift prospects, they can be reluctant. Here's why:

They don't want to share names of people they know because they're afraid they'll be asked to "hit up" their friends. That's perfectly natural. Who wants to offer up their friends for a solicitation?

So, how do you break through this resistance? You do it with a game.

Play the Prospect Game

When you make fundraising discussions fun and interesting, everyone will be more likely to participate. This game is an easy way for board members to help identify major-gift prospects. It will also introduce your board members to the major-gift process at the highest level. To put this secret tool to use, follow these prompts with your board members:

> "Using the word "catapult" moves board members into strategic thinking."

1. Please take out a small scrap of paper. You won't have to turn this in to anyone! (This last statement is a key part of the exercise. It lowers the pressure. Knowing no one will see their lists, they're free to think broadly and not be self-conscious.)

2. See if you can identify 10 people (or sources of revenue) who could *catapult* our organization's financial future to a whole new level. (Using the word "catapult" moves board members into strategic thinking – particularly thinking about strategic alliances that could change everything.

3. The people you name could be current or former donors. Or they could be prospective donors.

4. They have to be people we could reasonably approach. Not someone pie in the sky like Oprah or Bill Gates.

> How do you break through this resistance? You do it with a game.

Then sit down quietly and let them work. You'll see thoughtful looks on faces around the room. Give them plenty of time. Then say, "Now please turn to the person next to you and discuss one of the names on your lists."

Process the Exercise

After the game is over, ask participants, "What was it like to do this exercise?"

They'll probably have a lot of comments. Someone may say, "It was different and interesting to focus at such a high level." Or, "It puts everything on a completely different level. It's challenging. And it's where we *should* be focusing."

On the other hand, someone might say, "I don't know anybody who can make this list."

You'll likely get both extremes and anything in between. The point is to get them thinking about how they can get involved in identifying major-gift prospects.

You may hear a board member say, "What about Mr. Jones? Has he ever given? I play golf with him. I think I might be able to get the door open to him." Now you have a viable prospect – and a board member who's interested in helping you with the cultivation process. That's exactly what you want.

Follow Up with a Task Force

After playing the game and processing the results, board members will be focused and interested in discussing prospects. Don't leave all this good thinking to waste. Ask for volunteers for a temporary "VIP Prospect Task Force." Their job is to meet *only* twice with the staff and help create or add to your organization's own Major Gift Prospect List.

> Get them thinking about strategic alliances that could change everything.

Here's What You've Gained

Here's what this game does for board members:

It introduces them to a new way of thinking about identifying prospects.

It involves them in the whole idea of cultivation strategy – how to get the door open at the highest possible level.

It provides their buy-in and participation.

It makes fundraising discussions conversational and easy.

It starts them thinking big. You're not asking them to focus on $100 or even $1,000 prospects but on VIPs who not only give but are also important opinion leaders who influence many other donors. These VIP prospects are the civic, philanthropic, political, religious, corporate, or social leaders in your community. These major donors and key leaders should of course be your top priority.

It doesn't put anyone on the spot. It keeps the confidentiality that board members want. It eases them into the major gifts process – without pressure.

It's an enjoyable activity that bonds board members, creates an opening where they'll feel comfortable helping you, lightens the mood, and adds a bit of fun to the serious business of planning your financial future.

Gail Perry Group inspires nonprofits around the world with cutting-edge fundraising strategies and new tools to make fundraising more successful and more fun. Find smart strategies to help you raise tons of money at gailperrygroup.com.

Get Your Board on Board with Fundraising

You'll find more board-fundraising tools in these articles at NonprofitWorld.org:

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

The Five Most Dangerous Fundraising Fallacies (Vol. 32, No. 2)

Is There a Role for Your Board in Raising Funds? (Vol. 23, No. 3)

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

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

Fundraising with Your Board (Vol. 13, No. 5)

How Will the New Stimulus Act Affect You?

Many nonprofits are still struggling with financial problems due to COVID-19. This new law is designed to help.

By Andrew L. Steinberg

Rescue Plan Expands Relief for Nonprofits

The American Rescue Plan became law in March, 2021. It's one of the largest stimulus measures in history. The $1.9 trillion stimulus builds on the relief provided in the Coronavirus Aid, Relief, and Economic Security Act (CARES Act).

Several parts of the American Rescue Plan provide economic relief for nonprofit organizations. Here is a rundown.

Eligibility for PPP Extended

The American Rescue Plan extends eligibility for the Paycheck Protection Program (PPP) to nonprofits that were previously ineligible. It adds $7.25 billion to available PPP funding.

Now virtually all Section 501(c) organizations are eligible. Only 501(c)(4) social welfare organizations and 501(c)(7) social clubs are excluded. The size requirements for 501(c)(3), 501(c)(6), and 501(c)(19) organizations have been relaxed.

Originally, the CARES Act restricted PPP eligibility to Section 501(c)(3) and 501(c)(19) organizations with 500 or fewer employees. At the end of 2020, the Economic Aid Act expanded the availability of PPP loans to most Section 501(c)(6) organizations – including trade associations, professional societies, business leagues, and chambers of commerce – and to "destination marketing organizations" with 300 or fewer employees if they didn't engage in significant lobbying activities.

Section 501(c)(3) and 501(c)(19) organizations are now eligible to receive PPP if they employ no more than 500 employees per physical business location. Likewise, Section 501(c)(6) organizations and destination marketing organizations can receive PPP if the organization employs no more than 300 employees per business location, as long as don't do too much lobbying.

> "Newly eligible organizations must abide by lobbying rules."

> "More nonprofits are eligible for new federal programs."

Newly eligible 501(c) organizations are subject to the same lobbying and 300-or-fewer-employees limitations that apply to Section 501(c)(6) organizations. This means they must abide by the following rules:

1. They can't receive more than 15% of revenues from lobbying activities.

2. No more than 15% of their total activities can involve lobbying.

3. Lobbying costs can't exceed $1 million during the most recent tax year ended before February 15, 2020.

4. They can't have more than 300 employees per physical location.

Notably, the Economic Aid Act didn't specify how "lobbying activities" would be defined, leaving many organizations wondering how to count their lobbying activities for assessing PPP eligibility. Updated guidance on March 3, 2021, clarifies that 501(c)(6) organizations should use the definition of "lobbying activities" in the Lobbying Disclosure Act (LDA) to decide if they're eligible for PPP loans. Although the SBA hasn't yet explained whether the same definition applies to newly eligible 501(c) organizations, it would be reasonable for such organizations to apply the LDA definition until the SBA weighs in.

Previously, commentators suggested that organizations could use the federal tax law's definition of lobbying to determine eligibility. The LDA definition is far narrower than the tax code's definition of lobbying, which may be good news for many 501(c)(6) and newly eligible 501(c) organizations. Critically, the LDA doesn't require organizations to report state lobbying and grassroots lobbying expenses. Thus, many organizations that conduct state, local, or grassroots lobbying have a better chance of qualifying for a PPP loan than they would if a different definition had been applied.

The SBA's guidance doesn't state which time period you should look to when counting lobbying activities to decide if you've met the 15% threshold. The statute does provide that for purposes of deciding whether an entity has expended more than $1 million in lobbying, you should look to the organization's most recent tax year that ended before February 15, 2020. Many organizations have been applying this time frame for their 15% analyses in the absence of express guidance.

The PPP program application deadline has recently been extended. This extension will give newly eligible nonprofits additional time to apply for funding.

Nonprofits Receive Tax Credits for Giving Leave to Employees

Nonprofits with fewer than 500 employees can receive tax credits for voluntarily offering employees paid sick and family leave under the Families First Coronavirus Response Act (FFCRA). The American Rescue Plan extends the availability of these tax credits for paid sick and family leave taken for reasons related to COVID-19 and provided between April 1 and September 30, 2021.

The FFCRA, adopted in March 2020, required nonprofits with fewer than 500 employees to provide partially paid leave to eligible employees for COVID-19-related reasons until December 31, 2020. Employers received a dollar-for-dollar refundable tax credit for the cost of providing such leave.

> "PPP funds are available to virtually all nonprofits."

The mandatory paid leave provisions became voluntary at the beginning of this year, but employers could receive a tax credit for the cost of the paid leave that was provided through the first quarter of 2021. Thus, some employers continued to provide the same benefits in order to continue receiving the tax credits, as well as to generate goodwill with employees. Now employers can receive tax credits for qualified wages paid during leave provided through the second and third quarters of 2021.

Employee-Retention Tax Credit Continued till 2022

The American Rescue Plan extends till 2022 the employee-retention tax credit for nonprofits whose operations were fully or partially disrupted because of a government shutdown or which are facing significant revenue losses due to COVID-19. The employee-retention credit, initially enacted under the CARES Act, provided a refundable payroll tax credit on qualifying wages paid to certain employees from March 13, 2020 to December 31, 2020. Under the CARES Act, the employee-retention tax credit was capped at $5,000 for wages paid by eligible organizations in 2020.

> "Some tax credits have been extended."

Although the credit was set to expire at the end of last year, the employee-retention credit was previously extended to include the first and second quarters of 2021, and the maximum per-employee credit amount was increased to $7,000-per-quarter for 2021, for a maximum credit of $14,000 for 2021 wages. The American Rescue Plan further extends the availability of the maximum $7,000 per quarter credit for qualifying wages paid through December 31, 2021. Consequently, an eligible organization can now receive up to $28,000 in employee-retention credits per employee for wages paid in 2021 (for a total of up to $33,000 in employee-retention credits per employee across 2020 and 2021 wages).

Nonprofits that receive PPP loans may claim an employee-retention credit on a retroactive basis. But in order to prevent double-dipping, the employee-retention credit can't be claimed for wages funded by a PPP loan.

Andrew L. Steinberg is an associate in Venable's Nonprofit Organizations Practice (venable.com) in Washington, DC.

More on Tax Law, Lobbying, & Other Legal Matters

Find pointers, insights, and counsel in articles such as these, available at NonprofitWorld.org:

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

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

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

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

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

How to Manage Unemployment Claims (Vol. 28, No. 2)

Fourteen Questions to Ask before You Hire an Attorney (Vol. 34, No. 1)

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

How to Be Sure Compensation Is Reasonable (Vol. 17, No. 1)

Staffing Strategies in Light of the New Overtime Rules (Vol. 34, No. 3)

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

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

New IRS Employment Tax Initiative: What Does It Mean for Nonprofits? (Vol. 28, No. 2)

Ten Ways to Provide Value to a Business Partner & Income to Your Nonprofit

The more goals you can help corporations meet, the more eager they'll be to partner with you for mutual benefit.

By Karen Eber Davis

Do you want to earn more income from corporate partnerships? Of course!

To do so, you need to convince corporations how you can help them meet their goals. Here are 10 objectives that deal with customer growth. Each focuses on helping a business woo customers — a common business goal. Each provides high value to growing concerns. Each provides the opportunity for you to design several customized ways to meet the corporation's objective.

Recognition

1. You can move a potential customer from never having heard a business name to recognizing it with a prompt.

2. You can move a potential customer from never having heard a name to recognizing it *without* a prompt.

3. You can remind potential customers of a business name and service or product.

Permissions

4. You can invite a potential customer to sign up for a business promotion.

5. You can encourage a potential customer to open an e-mail or print mail.

6. You can encourage a potential customer to remain on a mailing list.

Interactions

7. You can encourage a potential customer to accept a call from a business.

8. You can encourage a potential customer to initiate contact with a business.

9. You can encourage a potential customer to try a business service or product once.

10. You can encourage repeat business.

> "Offer these instead of the weary bronze, silver, gold opportunities."

> "Help the business woo customers – a common business goal."

As you develop partnerships, offer some or all of these objectives at different cost ranges instead of the classic but weary bronze, silver, gold opportunities. Help your business partner choose the objective. Then decide what the total cost will be and what you'll do to help the corporation meet the objective.

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.*

More Ways to Provide Value

For more ideas on selling businesses on the value of partnering with your organization, turn to articles such as these at NonprofitWorld.org:

Pitfalls to Avoid when Seeking Corporate Support (Vol. 34, No. 4)

Increase Donations from Local Businesses (Vol. 23, No. 4)

How to Solve the Biggest Problem with Corporate Giving (Vol. 36, No. 2)

For-Profits and Nonprofits Meet Missions Together (Vol. 25, No. 4)

Boost Your Share of Corporate Partnerships (Vol. 22, No. 1)

How to Target Corporations to Diversify Your Funding Mix (Vol. 25, No. 1)

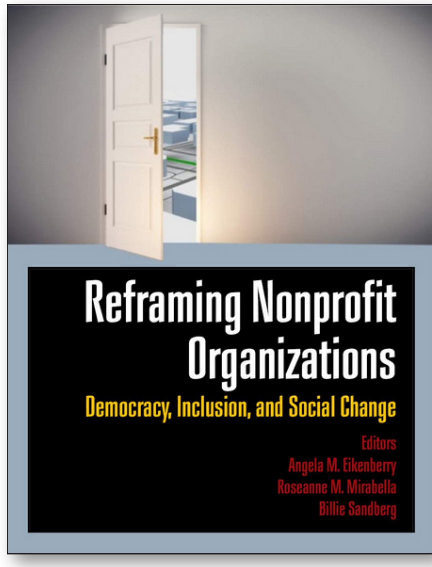
Enlightened Self-Interest: Selling Business on the Benefits of Cause-Related Marketing (Vol. 15, No. 4)

The Care and Nurturing of Corporate Friends (Vol. 14, No. 1)

It's Time to Challenge Nonprofit Norms

Nonprofits must find a balance between organizational permanence and social change.

Reviewed by Terrence Fernsler



Reframing Nonprofit Organizations: Democracy, Inclusion & Social Change. *Edited by Angela M. Eikenberry, Roseanne M. Mirabella, & Billie Sandberg. Melvin & Leigh Publishers (melvinleigh.com).*

Do today's norms subvert nonprofits' missions? Do they sabotage the very social constructs they're intended to support?

The answer is yes, according to the authors of *Reframing Nonprofit Organizations*.

We can trace the problem to the recent emphasis on professionalism in the nonprofit sector. The focus has shifted to efficient management rather than creativity, passion, and caring.

To a growing number of nonprofit scholars, the root concern is how we perceive the world. The practices of the market environment are often mimicked in nonprofit organizations. But most nonprofits fulfill their missions better when using relational, participative, and cooperative approaches.

"Nonprofits fulfill their missions better when using cooperative approaches."

Reframing Nonprofit Organizations takes critical perspectives about topics that affect nonprofits but aren't often discussed internally. These include issues such as power, commercialization, the market, the concept of association itself, assumptions about neoliberalism, and the difficulty of leading in complex environments.

Each author in this edited book goes beyond critiquing mainstream approaches and takes a hard look at the purposes behind nonprofits. The authors discuss how organizations can carry out their missions and preserve their values in a competitive society. They consider how nonprofits can improve fundraising, finances, marketing, advocacy, and more while making a greater difference for their constituents and communities.

Each chapter of the book overturns assumptions and explores essential truths. For example:

- **The teaching of management for nonprofits** must change so that it is grounded in mission accomplishment.
- **When we say we're accountable,** we must ask ourselves: Accountable to whom? Accountable in what ways? How do we convey the message of accountability to all our different audiences, including donors, staff, recipients, and other stakeholders? Accountability means very different things to different people, so it's not enough to say we're "accountable." We must spell it out in specifics for each separate group.
- **We need to analyze** the ways that racism and sexism operate in nonprofits. We must adopt a broader lens that ensures opportunities – especially leadership opportunities – for people of all backgrounds, races, and genders. We must ask, for example, why most nonprofit leaders are men when women dominate the nonprofit labor force. We must rethink how we talk and write about nonprofit leadership with these issues in mind.
- **For problem-solving to be effective,** all stakeholders must seek solutions together as genuine partners.

Reframing Nonprofit Organizations is an important call for critical thinking in nonprofit organizations. Anyone committed to strengthening the work of nonprofits and helping the sector achieve its full potential will find this book necessary reading.

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.

Spark New Ideas Throughout Your Organization

You need a creative edge in this turbulent world. Here are six ways to assure it.

By Steve Blue

One thing's for certain: If you're not innovating, your services will eventually become obsolete. Innovation isn't an option – it's a necessity. And it becomes more so every year.

So how, exactly, do you spark innovation? It's an important question, especially if your organization has been around for a while and is comfortable with the status quo. Use these six tactics to point the way.

1. Make innovation part of everyone's job description

The first line item on every job description should state that a primary duty is to introduce innovative ideas into the organization. All employees, from the reception desk to the executive door, should understand that it's their job to offer ideas to improve the organization and its offerings.

Innovation must be one of the organization's core values, so much so that it's tied to performance appraisals. Determine a way to measure innovation. Make innovative thought part of the performance review process. By doing so, not only do you give kudos to the employees who innovate, but you also say good-bye to the ones who don't. Pretty harsh, isn't it? So is what happens to all the nonprofit organizations who shut their doors every year because they've become outdated.

2. Invest in innovation

Contrary to popular belief, everyone is creative. The key is to understand how to unlock that creativity. Train every single employee in the principles of creative problem-solving. Hold "innovation fairs," similar to science fairs. Take your employees on field trips to highly innovative organizations outside your industry.

3. Provide time to innovate

It isn't enough to set the expectation to innovate. You must provide time for innovation. To really push the innovation envelope, you should encourage your employees to spend 20% of their time innovating and brainstorming new ideas. But if you still expect your team to accomplish the same amount of work in the remaining 80%, that would be unfair and, in the end, would never work. So you have to bite the bullet and find more people – paid staff, volunteers, interns – to cover that 20%. You need to set the expectation that "thinking about things" is just as important as "building things."

4. Provide the space to innovate

Asking employees to innovate and brainstorm without providing a space to do it in can squelch creativity. Once you've established the practice of innovation, devote a location within your organization where people can meet regularly and without interruption.

This space can be as simple as an empty cube dedicated for innovative practices, or as involved as an offsite location where the round-the-clock focus is innovation. Above all else, you must make it clear that these spaces are for all employees, not just a select few.

Allotting spaces serves two purposes:

- ***It provides*** an assigned area in which to innovate.
- ***It shows employees*** how serious your organization is about the process.

> "Thinking about things" is just as important as "building things."

Keep in mind there is no magic in this space. The magic is in unlocking the creative genius in every one of your employees. The innovation space only facilitates this. Before you build your space, be sure you have taken the above steps in creating the culture and providing people the tools and training to innovate.

5. Celebrate, recognize, and reward innovation

Recognizing innovation will change workplace culture for the better and reinforce positive behaviors. Rewards needn't be expensive. You might invite the best innovators out to breakfast, offer them coupons for restaurants and get-aways, or have a professional photographer take photos of the team to mark their achievement.

Praise innovative efforts every chance you get in every way you can think of. Be, well, *creative* in how you recognize people. Send them on hot-air balloon rides. Hire an airplane sky-writer. The crazier the ideas you come up with, the more they'll ignite imagination and encourage further innovation.

6. Fight fear and resistance

Do you remember Woolworth's, the five-and-dime retailer? No? That's because it was out-innovated by Walmart and went belly up – likely because it stayed in its comfort zone until there was nothing left to do but close up shop.

Regardless of how long your organization has been around, it's imperative to keep the creative wheels turning. The logistics may seem daunting, yet the biggest risk isn't a technical one; it's organizational. People fear what they don't understand, and they'll kill a project they're afraid of. You have to get out in front of that resistance and fight it early and often.

As you move your organization toward more innovative thought, be prepared for some pushback. Also, be ready to restructure your organization and even cut people loose if necessary. You need to surround new developments with people who believe in innovation. Otherwise, you'll be left with those who'll do little more than look for flaws.

Steve Blue is president and CEO of Miller Ingenuity (MillerIngenuity.com) and author of American Manufacturing 2.0: What Went Wrong and How to Make It Right. *He is a nationally recognized transformation expert and speaker.*

Be a Better Stormer

"The best way to get a good idea is to get a *lot* of ideas," Linus Pauling has noted. That's the concept behind brainstorming and "question-storming" (in which the group generates ideas in the form of questions). Storming is a skill you can learn, and Tom Kelly provides top-notch instruction in *The Art of Innovation* (penguinrandomhouse.com):

Storm often. You need to keep storming muscles in shape through frequent practice. The design firm IDEO holds hour-long storming sessions nearly every day, according to Kelly. You want the buzz of creativity "to blow through your offices as regularly as a breeze at the beach," he says.

Create a problem statement. Before you begin question-storming, be sure everyone knows the problem you're trying to solve. Focus your problem statement outward, on the people who will benefit, rather than inward on some organizational objective.

Ask people to write down as many questions as possible related to the problem statement. Then share people's questions with the group.

Number each question. It's helpful to decide beforehand how many questions you'll come up with in your session. The group facilitator can scrawl down the numbers and questions on a whiteboard or other medium that's visible to all.

"Build and jump." Urge participants to build on each other's questions and "jump" to a variation or slight twist of their own.

Prioritize the questions. At the top of the list should be those questions people are most eager to pursue.

Don't forget to follow up. Select a few of the most promising ideas, and schedule a time to follow up on them. Don't let your question-storming time go to waste. Be sure to bring your new ideas to fruition.

Stay Ahead of the Curve

For more on obtaining a creative edge, see these articles at NonprofitWorld.org:

Transforming Your Organization from the Inside Out (Vol. 25, No. 4)

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

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

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

When It's Time for a Turnaround (Vol. 26, No. 2)

Dealing with Change in A VUCA World (Vol. 37, No. 4)

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

Gain Extraordinary Impact (Vol. 32, No. 4)

Creating Breakthroughs (Vol. 26, No. 4)

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

Say Yes to Solving the Problem

When your project gets into trouble, use these problem-solving keys to get back on track.

By Todd Williams

If you're innovating and trying new things (which you should be doing), you're going to encounter problems. How do you keep them from derailing your project? The solution is good leadership. Lead each of your projects with the following keys in mind.

Keep Problems from Happening

You can't prevent every problem. But you can keep them from happening needlessly. To avoid problems in the first place, there are four crucial steps:

1. **Build** the right team, and monitor it closely.
2. **Start** the project on the correct premise.
3. **Understand** and mitigate risk.
4. **Accept** and manage change.

Acknowledge Problems when They Occur

Acknowledging a project's problem is like Alcoholic Anonymous's 12-step process: The first step is to admit you need help. Don't put off this first step too long. Ask for help the moment you see a problem begin to develop.

Denial is the biggest roadblock to solving a project's issues. People always think they can make it better with just a couple more weeks. They can't. They need to re-evaluate the project's goals.

Beware of Technology

Technology makes almost anything more efficient. However, before you apply technological tools, have the right people and processes in place. Otherwise, you'll get into trouble just as badly as before, only faster and much more efficiently.

Audit Your Projects

Too many project managers are overly passionate about their project. They root for it like a high-school cheerleader. Your job isn't to advocate for the project. Your job is to be objective – passionately dispassionate – and determine what's working and what to get rid of.

Trust the Team

The answers to a project's issues are in the team. Talk to team members. Ask for their input, and hear what they have to say. Learn from them. Be one of them.

Don't Search for Blame

When problems crop up, it's tempting to try to place blame. Not only is it a waste of energy, but finding someone to blame will give you only fleeting pleasure, and you still need to fix the problem. It's like peeing in a dark pair of pants: You get a warm feeling, no one else notices, and you have a horrid mess to clean up.

Believe in the Data

Data and numbers hold the answer. Numbers are truthful little bastards: Squeeze them hard enough and they'll tell you the truth. It's integral to their job.

Negotiate the Solution

There are three parameters that control a project – scope, schedule, and budget. So to solve problems with a project, you need to involve stakeholders to change one, two, or all three of these parameters. Identify the people who are affected by these changes and negotiate the solution with them.

Todd Williams has over 25 years of experience turning project lemons into lemonade. He is the author of Rescue the Problem Project: A Complete Guide to Identifying, Preventing, and Recovering from Project Failure *(rescuetheproblemproject.com).*

More Problem-Solving Guidance

Keep your projects on track with these articles from NonprofitWorld.org:

Build a Powerful Staff Team (Vol. 18, No. 4)

How to Get It Done (Vol. 25, No. 6)

Creating Breakthroughs (Vol. 26, No. 4)

The Promise and Pitfalls of Organizational Change (Vol. 28, No. 4)

Five Project-Management Myths (Vol. 26, No. 2)

Risk & Your Brain: Taking Smart Risks & Making the Best Decisions (Vol. 38, No. 4)

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

Change Is All Around You: How Can You Tame It? (Vol. 38, No. 1)

Are Your Training Goals in Alignment? Four Keys

Be sure you connect your training with your overall goals.

By Cordell Riley

There are two types of training. The first teaches employees to perform the tasks required by their jobs. The second type does that too, but produces far more transformational results, because it also teaches skills and behaviors that align with organizational goals.

To illustrate this point, envision a golf caddy as a trainer. That caddy can hand the golfer one club at a time and say, "Here's the best club for this shot." That might improve the golfer's game. But what if the caddy added a higher level of information by giving perspective on the overall layout of the hole, the potential hazards in the path, and even a strategy for playing the entire course?

Given the choice, of course you prefer the bigger picture. But how do you do that in planning your organization's training process? Here are four important steps to take.

> "Measure people's behavior before and after training."

1. Define & Keep Your Most Important Goals in Mind

Are you striving to create an organization known for delivering superlative customer satisfaction? That's a great goal, but reaching it means defining specifics that can get you there — what you want your training to achieve.

For example, you train your phone reps to resolve 90% of all complaints during people's first calls. Or you could focus on training those reps to deliver the kind of care that gets 90% of callers to report that they're "extremely satisfied" on post-call surveys. When you define goals, you can design training that achieves them.

Another way of stating this principle: Begin with the end in mind. That means understanding the bigger vision of what you want your organization to become, then defining specific training steps that can get you there.

2. Break Down Silo Walls

Trainers are often brought into different organizational sectors and encouraged to stay in them. They might teach only computer skills or customer service, for instance. But what if your trainers thought outside the silos and delivered

"Begin with the end in mind."

valuable things that resulted in improvements across your entire organization?

One way to reach this objective is to initiate discussions between your trainers and the people who create marketing, oversee your online presence, and so on. Invite trainers to talk to people from many different areas of your organization. The more such input trainers receive, the better they'll be at making the training encompassing and effective.

3. Don't Create Training in a Vacuum

Whether your training team works in-house or you use outside trainers, make sure to engage them in conversations about organizational collateral. Ask them to peruse relevant publications, news stories about your organization, press releases, and any other pertinent documents you can provide.

Then ask the question: Do those materials suggest any untapped opportunities to align your training specifics with larger trends, goals, and initiatives?

4. Tie Your Training to Measurable Metrics

It's essential to develop a set of clear metrics to measure people's behavior before and after training. It's the only way to understand what your training has accomplished and how much closer you are to meeting your goals.

Here are some suggestions for developing metrics that don't just gather data but reveal deeper progress:

If your vision is to become a leader in customer service and retention, you can survey customers before and after your employees have gone through the training program. You should ask customers about their overall satisfaction, the likelihood they'll recommend you to other customers, and similar factors.

If you want to gain maximum value from a limited-time offer and provide training to support that objective, your goal could be a certain percentage of improvement among employees who took the training. Measure and report on those results after the training has been delivered.

"Do those materials suggest any untapped opportunities?"

Beyond the Training Track

Available at NonprofitWorld.org, these articles provide more perspectives on education and training for you and your staff:

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

Using Training Strategically to Build Organizational Capacity (Vol. 14, No. 4)

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

Board Problems Reflected in Training Requests (Vol. 33, No. 1)

Motivate Your Workers with Training Opportunities (Vol. 33, No. 3)

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

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

Bring Your Training Home (Vol. 37, No. 4)

If you're implementing HR training in an effort to increase employee retention, you can measure retention rates before and after training and survey employees on metrics like, "I see a clear career path if I remain employed here."

Once you are measuring, you can tweak, modify your training, and find ways to improve results. But one thing is for certain: If you don't measure and adjust, your training will never deliver the results it could.

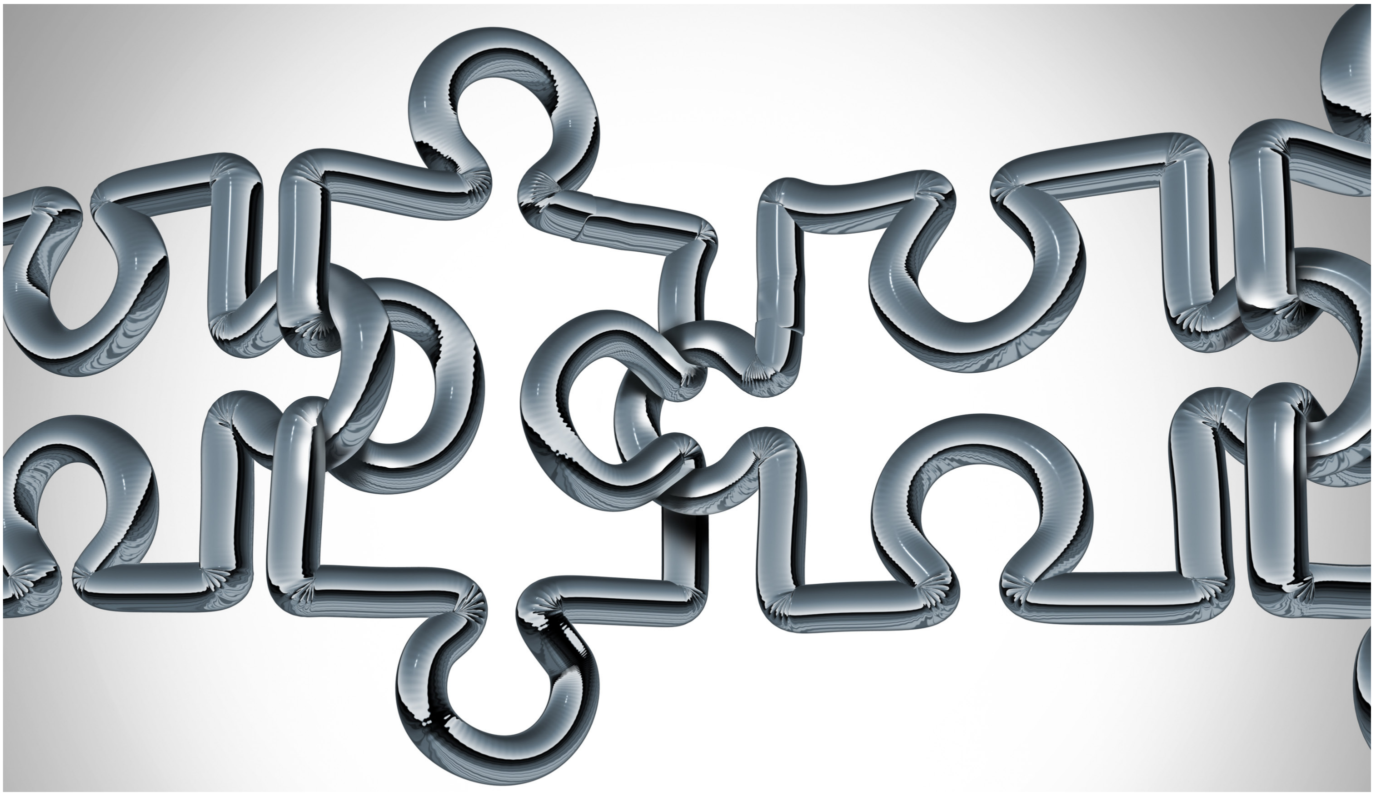
In Conclusion . . .

If you ask a group of leaders and managers to define what training is, chances are that most of them will say something like, "Training is a process that teaches people the skills they need to do their jobs better."

Of course, that's true. But what if you ask a series of deeper questions like, "Wouldn't you like your training to build a workforce that builds your brand . . . helps your organization achieve its mission . . . and communicates what you stand for to the world?" Most will reply, "Yes, we would!"

As you launch new training initiatives or refine those you already have, keep those larger issues in mind. The better you can align training with your overall goals, the more successful you can become.

Cordell Riley is the founder and president of Tortal Training (tortal.net), a leading provider of training solutions.



Get Closer to Supporters than Ever Before: How to Make Connections & Boost Action

These four doable methods will help you have more meaningful connections with the people who matter most.

By Nancy Schwartz

There are proven ways for your organization to strengthen relationships with the people whose support, loyalty, and actions you want — donors, volunteers, and even staff (who are often overlooked as important supporters). Using these approaches, you can get to know your supporters, focus in on what's important to them, and keep in touch at receptive times. Here are four specific things you can do to create strong, lasting bonds:

1. Launch a Marketing Advisory Group

Begin by identifying your target audiences. Prioritize segments of each audience that share similar wants, needs, and preferences. Then put together a marketing advisory group that includes at least one person from each segment. That way, you'll have access to many different perspectives and you'll have the right person to turn to whenever needed. This group will provide a solid diversity of opinion when you solicit input on a specific campaign or message. If you don't have people in mind that represent all the perspectives you need, ask colleagues for recommendations.

When you invite people to join your advisory group, be sure to specify your expectations. Don't ask them to help more than once or twice a month, and ask for no more than five to 10 minutes at a time.

The things you ask of your advisors will vary depending on the task at hand. Ask a few of them for input on drafts of messages or website improvements. Or ask all of them to complete a brief online survey to share their perceptions of a new program and the gap it will fill.

Ask with thought, and don't overburden your advisors. Most important, thank them frequently and often.

Try using your advisory group for six months, refining the group over time. You'll be amazed at how the insights you receive will help you connect with your audiences.

2. Listen to Social Conversations

There's so much being said online about your organization, your cause, and organizations you compete with for donations that you'll learn a lot by just listening. By

> Facebook has several advantages as an audience research tool.

monitoring social channels for conversation on relevant topics, you'll see what resonates and why, enabling you to better engage *your* people.

Keep in mind that with this kind of social listening, you won't know who's talking and how that person maps (if at all) to your targets. Nonetheless, if there's a groundswell of conversation on a topic important to your organization, you want to hear it.

Social monitoring options range from free tools like Google Alerts to paid services such as Mention, and social listening services, which enable you to focus in and listen to your people (those in your donor management system, e-news subscribers, volunteers, and others).

Case Study: American Friends Service Committee Uses Social Listening to Connect

A few days after the fatal shooting of Michael Brown, the American Friends Service Committee (AFSC), noticed a significant shift in focus on social media to the hashtag #Ferguson. They could quickly see that terms such as "police" started trending, nationally and among supporters in AFSC's database (CRM).

AFSC created a saved search to see exactly who in its CRM was talking about Ferguson on Facebook and Twitter. Next, they invited those supporters to a Google Hangout that resulted in record-high participation and 74 donations. That's incredible targeting!

3. Ask & Listen in Your Social Communities

If your organization has an active community on Facebook, Twitter, or other interactive platforms, you have a focus group ready to roll. But before you just ask, and ask, and ask again, prioritize what you want to know. Also, decide how to filter and weigh what you hear since your social communities may not map exactly to your donors and prospects.

Facebook has several advantages as an audience research tool:

You can easily run your organization's donor or e-mail list against Facebook subscribers who have "liked" your page. That makes it easier to map responses to your prioritized audiences.

The Facebook Live Video tool is an excellent way to gather quick feedback on a draft logo, design, message, or e-mail format (anything, in fact, easy to view via an online video) *if* you have a huge and active following on Facebook.

Polling on Facebook is super easy to set up, and it's easy for people to respond.

4. Ask Folks as They're Leaving a Program or Event

This technique is ages old but works well, as long as you ask just one or two quick questions. If your question is brief, ask verbally. If you want to gather names or have a couple of questions, then have pens and printed mini-surveys or tablets on hand for responses. If the event is online, pop up a quick survey before the finish.

Put Your Findings to Work

You can use the insights you glean from these four steps to build connections and boost action. But that will happen only if you log, share, and analyze what you learn, then act on it.

Go one step further by adding these insights to supporter data. That's your path to getting closer than ever before to your people and activating them to move your mission forward.

Nancy Schwartz (nancy@smartmedicare.com) is a medicare coach who is well known for her blog and newsletter "Getting Attention."

> It's easier to gather quick feedback if you have an active Facebook following.

Expand Your Reach

Create more bonds with tips in these articles (NonprofitWorld.org):

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

Are You Using the Double Power of Focus Groups? (Vol. 14, No. 5)

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

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

When Should You Conduct Surveys? (Vol. 28, No. 1)

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

Relationship Marketing: Guaranteeing the Future (Vol. 14, No. 5)

A Better Brand = More Loyal Supporters (Vol. 38, No. 4)

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

Seven Kinds of Listeners & How to Approach Them

Appeal to all seven types of listeners to be sure everyone understands your message.

By Joe Curcillo

Before you speak, think about your audience, whether it's one person, two people, or a large group. Be aware that not everyone listens in the same way.

The Seven Listener Styles

There are seven types of listeners:

1. The Active Listener. These listeners hang on your every word. They take in your message and listen attentively. They show signs of response, either physically or verbally, such as nodding or saying, "mmm-hmm" to show they're listening. The active listener will also be the first person to give you feedback to assure you they understand.

This is the Holy Grail audience, and it's rare. Appreciate these listeners, and make good use of their feedback.

2. The Inactive Listener. These are the listeners who let your words flow in one ear and out the other. Commonly, they're far away in another place daydreaming or solving other problems. Or they may be waiting to jump into the conversation and state their position without hearing yours.

Find ways to grab the attention of the inactive listener. (See "Four Ways to Connect with All Types of Listeners" below.) Use drama if necessary to redirect their focus to your message.

3. The Selective Listener. These listeners are waiting to hear what they expect – or want – to hear. They tend to hear only enough information to formulate a counter argument. Or they may filter your words until they feel they've achieved base comprehension.

With selective listeners, you'll need to emphasize (1) the parts of your message they most need to hear and (2) the details that they're most likely to filter out.

When you see people tuning out something you've said, try saying the same thing in another way. A vivid metaphor or story, for instance, might make your point in a way that will get through to them.

4. The Rushed Listener. Much like a selective listener, rushed listeners will listen only as far as needed to get the gist of what you're saying. Then, they'll transition into inactive listeners.

Use tactics similar to those for inactive and selective listeners. If there's a legitimate reason for the rushing, see if you can reschedule the talk for a more leisurely time.

5. The Scared Listener. These listeners are so fearful of being criticized or rejected that they may hear only those words and phrases they feel they must defend against. Thus, you'll be speaking to a selective listener in self-defense mode.

Again, stress the parts of your message you need these listeners to hear. Emphasize favorable and affirming words. Balance every negative statement with four positive ones, and be sure they hear the motivational, inspirational parts of your message.

6. The Thoughtful Listener. These people would be active listeners except for their overriding wish to please you. They tend to listen only for what they must do to make you happy. Your pivotal message may thus be lost to them. Treat them as selective listeners, much like scared listeners, emphasizing the pieces of information they may overlook.

7. The "Uneducated" Listener. These listeners aren't uneducated in an academic sense. They're uneducated about the topic at hand. No matter how smart or motivated they are, they can't pick up what you're saying if you use words and concepts that are unfamiliar to them.

The way to reach such listeners is to make sure they understand the terms you're using. Define anything that might be unclear. (See "Feed their heads" below.)

Four Ways to Connect with All Types of Listeners

As you prepare to communicate, size up your audience. If you're speaking to just one or two people, figure out what type of listeners they are and adjust your message and delivery accordingly. If you're speaking to a large group, every sort of listener may be included in your audience, so customize your speech to reach all listener types. To make certain that you get through to everyone, use all the tools at your disposal. Some suggestions:

1. Change your voice. Vary your vocal tone and volume to seize the attention of inactive listeners and to emphasize material that selective listeners might miss. Sometimes, rather than speaking louder in hopes of being heard, it can be more effective to speak softly, forcing people to listen more closely.

When you have something vital to say, try pausing first and letting the silence stretch out for a moment. That will make the point, "This is important. I want to be sure you hear it." This strategy will work when speaking to all the different kinds of listeners.

2. Use body language to advantage. Change your position frequently. When speaking in a large venue, move around the room. Use gestures. Smile when your message warrants it.

> "Listen to your listeners."

If you're speaking one-on-one, look your listener in the eye. Even if it's a big group, you can use eye contact effectively. Mentally divide the group into fourths, and make eye contact with someone in each quarter, one at a time. If you notice someone whose mind seems to be wandering, hold eye contact until you regain their attention.

3. Feed their heads. Use vocabulary that everyone can understand. Always avoid jargon. If you must use technical terms, define them.

Use brief, simple sentences and short, vivid words. Simple, concrete language will appeal to all types of listeners and make your speech more engaging.

4. Give them something to remember. Create an anchor that will stick in people's minds. This anchor might be a touching story or a striking symbol. To make it even more memorable, portray it on a giant sign or banner. It's also effective to use props, holding up something that will help people visualize your example.

Weaving together all these considerations will create a tapestry that covers the full range of listeners. Take time to pay attention to your communication process, and then, listen to your listeners before you speak. You will hear volumes that allow you to communicate much more successfully.

Joe Curcillo, "the Mindshark" (themindshark.com), is a speaker, entertainer, lawyer, and communications expert. As an adjunct professor at Widener University School of Law, he developed a hands-on course based on the use of storytelling as a persuasive weapon. He has been a professional entertainer, helping organizations improve their communication techniques, since 1979.

Your Communication Checklist

Sharpen your communication skills with these articles (NonprofitWorld.org):

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

Face to Face (Vol. 14, No. 1)

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

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

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

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

Create a Thriving Organizational Culture

If you want happy, productive employees, build a people-focused culture.

By Kerry Alison Wekelo

Some employees just aren't into their jobs.

In fact, that may be true for most employees. The Gallup organization reports that just 32% of employees say they're enthusiastic about and committed to their work and workplace.

It doesn't have to be that way. With the right approach, nonprofit leaders can improve their organizational culture and motivate employees to perform at their highest capacity.

Successful leaders are the ones who intentionally use their behavior as a positive example. If you expect employees to work overtime for important deadlines, for example, they're more inclined to do their best if you also stay and work the overtime.

To engage those employees, a leader must commit to supporting people's growth. Here are four ways to do that:

1. Insist on a healthy work-life balance

Work and home used to have clearer boundaries, but these days work is always a mouse click or text message away. That can make it tough for both employees and leaders to balance their lives, but it's important that they do.

When your life is well balanced, you'll be more satisfied, more motivated, happier, and healthier. To achieve that balance, you need to learn to say "no," set boundaries (such as declining to take work calls after 9 p.m.), and handle issues as they come up so you aren't thinking about them after you go home. Leaders should practice this themselves and then facilitate it for employees.

2. Practice effective communication

Communication isn't just about what you say, it's how well you listen. You need to be an active listener. That means you not only hear the words the other person is saying, but you try to understand the complete message that's being sent. To achieve that, do the following:

- **Practice** empathy.
- **Focus** your attention.
- **Show** you're listening through both verbal and non-verbal responses.

- **Suspend** judgment.
- **Ask** questions.
- **Verify** that you correctly understand the other person's message.

3. Focus on your people

There are three keys to having happy workers:

- **Hire** the right people.
- **Provide** generous benefits.
- **Prioritize** wellness efforts that encourage employees to exercise and eat right.

4. Regularly conduct employee surveys

It's important to ask employees about what's working and what's not working. But remember that surveys that only gather information aren't useful. To make surveys effective, you must provide detailed results back to your team and create an implementation plan that includes some of your employees' ideas.

Although every person is different, we universally do well with leaders who focus on appreciation, respect, and trust, and who empower teams to add value to the organization. Exceptional leaders know how to motivate employees, retain quality talent, and cultivate job satisfaction.

Kerry Alison Wekelo (kerryalison.com) is managing director of human resources and operations for Actualize Consulting. She also is author of Culture Infusion: 9 Principles to Create and Maintain a Thriving Organizational Culture, *and founder of Zendoway, a company that encourages holistic wellness.*

Energize Your Workforce

Use the following articles (Nonprofit World.org) for more insights into creating a thriving organizational culture. Give all employees access to these articles to enhance their learning and leadership skills:

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

Yes, you CAN Balance Work & Family Roles (Vol. 31, No. 6)

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

Bring Your Training Home (Vol. 37, No. 4)

Seven Steps to Hiring & Keeping the Right Person (Vol. 32, No. 4)

To Make an Impact, Improve Your Non-Verbal Skills (Vol. 38, No. 3)

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

Going Beyond Why: Three Powerful Ways to Cultivate a Culture of Purpose (Vol. 39, No. 1)

Productive Employees: Two Crucial Ingredients (Vol. 37, No. 2)

Are You Offering the Right Perks? (Vol. 35, No. 1)

Reimagining Your Hiring Practices: A Self-Assessment (Vol. 36, No. 3)

Creative Bonding Ideas

Here are more ways to ramp up relationships with employees, courtesy of Kerry Alison Wekelo's inspiring book *Culture Infusion* (kerryalison.com):

SCHEDULE A PLAY DATE WITH YOUR COWORKERS

Play games at lunch, go to a sporting event together, take a painting class, or get out and move together on a walk-and-talk. Survey employees to find out what they want to do. Then use that feedback to choose the event.

HOST AT LEAST ONE WELLNESS FAIR EACH YEAR

Bring in vendors to offer samples of healthy food and products. Have movement classes as part of the fair, and give free chair massages. Provide raffles to give away wellness prizes such as massages, gym memberships, glass water bottles, and the like. Another option for a wellness fair is to offer health screenings. The more often you have such fairs, the better. Doing so will incorporate employee wellness into your culture and show in a tangible way that you care about people's well-being.

MAINTAIN A "GET-TO-KNOW-YOU" BUDGET

Use this budget to get to know each of your employees better through lunch meetings, coffee breaks, and so on. If you have a large enough number of employees, give each department or team a budget of their own so they can do the same.

SPREAD GRATITUDE

Suggest a week of random acts of kindness with employees and external customers (nothing monetary allowed). The act of giving improves people's moods and makes them more appreciative themselves.

UNDERSTAND THE DIFFERENCE BETWEEN TRAINING & EDUCATION

You need to offer *both*. A comprehensive learning benefit includes training (which is about doing something) and education (which is about knowing something). Solicit ideas from employees on learning opportunities they'd like you to offer. Encourage them to gain personal-interest as well as job-related skills. This will keep them satisfied and energized and show you are interested in their holistic well-being.

Life after the Pivot: Storytelling to Refresh Your Nonprofit Outreach

In today's shifting landscape, have you found new ways to connect?

By Yvonne Hundshamer

Donor fatigue has set in for many people, who've begun to feel unappreciated by the nonprofits they've been supporting. It's time to re-engage your key audiences by bringing new life into your communications.

Perform a snapshot audit of your delivery platforms

Have you diversified the ways you interact with your audiences?

Are you relying too heavily on social media channels? What percentage of your audience is active on social media?

Are you taking advantage of the energizing power of video? Don't let lack of time, lack of equipment, or lack of know-how keep you from exploring this important communication medium.

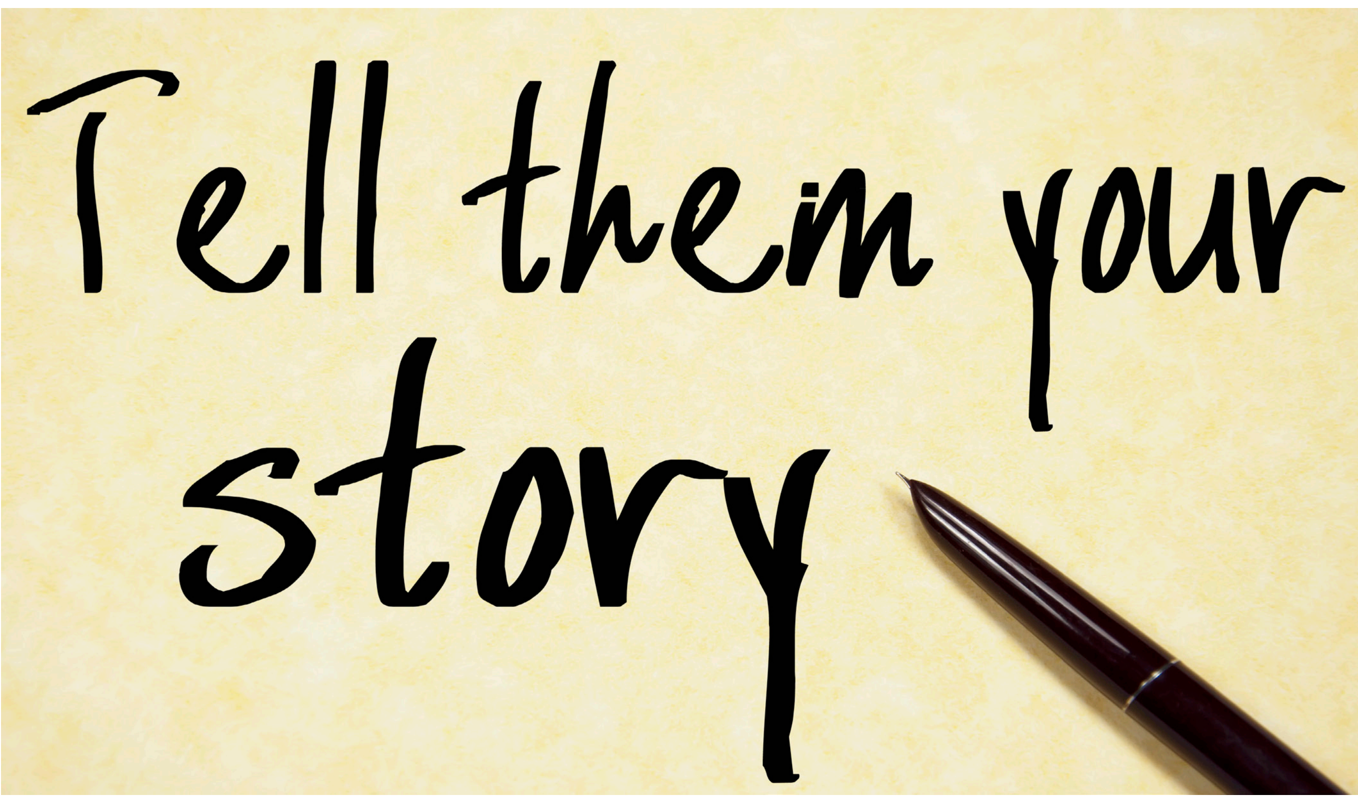
Refresh your narratives

Include staff from across the organization: What anecdotes are they hearing from participants or volunteers? What impressions can they give from boots-on-the-ground experiences?

Look for new ways to capture stories that highlight your mission. Frontline staff can help you bring inspiring mission moments to light.

Be sure people have what they need to collect new stories: Can they use their personal phones, or do you have a phone or professional camera for impromptu interviews?

Think of the excitement and energy you and others brought to the nonprofit just starting out. Imagine harnessing that energy today, with an established brand and a history of success.



> "How are you communicating in today's "new normal"?"

Think about post-COVID messages

Remember that messages that were compelling six months ago may have shifted. Everyone is dealing with a very different world today.

Carve out a lunch hour to brainstorm and prioritize messages.

Give stakeholders a better understanding of your stewardship as you prepare for post-COVID programming. How will you plan for their investment in your mission?

You have important stories to share. These stories have the power to inspire, excite, and support those vital to your organization's purpose. Take the time now to prepare for messaging that highlights how you plan to use your own best practices as a map for the future.

Yvonne Hundshamer (yvonne@bluegrottoinc.com) is the founder of Blue Grotto Inc., a Minnesota-based business that works with organizations to document culture and values, celebrate milestones, and articulate vision.

Time to Amp Up Your Storytelling

Storytelling promotes the shared vision that strengthens your relationships. Today, there are many platforms for storytelling. Add social media and video to your traditional outreach like annual reports and mailings and you have a host of ways stakeholders can find you. Find details in articles such as these at NonprofitWorld.org:

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

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

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

Extraordinary Impact on an Ordinary Budget: It's Possible with These Tactics (Vol. 37, No. 3)

Livestreaming for Good: A Nonprofit Guide (Vol. 38, No. 3)

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

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

Revitalize Your Thank-You Letter with a Good Story (Vol. 37, No. 2)

Yes, You CAN Make Powerful, Affordable Videos (Vol. 14, No. 2)

New Ideas for a New Era (Vol. 38, No. 3)

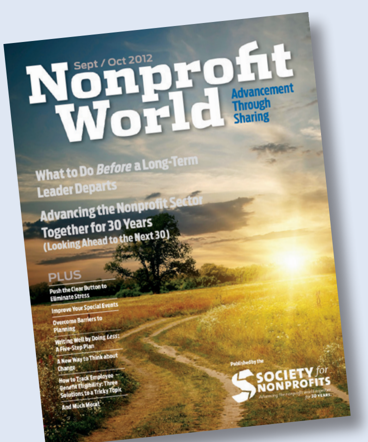
Integrate Social Media into Your Website (Vol. 35, No. 1)

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

Dialing for Dollars, Reinvented (Vol. 38, No. 3)

The Power of Story: Bring Your Brand to Life (Vol. 34, No. 4)

Coming Up in *Nonprofit World*



- Increase Donations with Google Ad Grants
- Avoid Internet Dangers: Practice Safe Surfing & Defensive E-Mail
- Are You Sure You're Training the Right Things?
- Listen Your Way to Major Gifts: Power Questions Your Donors Will Love
- Satisfying a Demand for Dialogue
- Overcome Unconscious Bias in the Hiring Process
- Fostering Organizational Resilience
- Are You Breeding the Conditions for Fraud to Occur?
- Know the Facts about Fundraising Today

Plus much more!

How to Hold a Virtual Fundraising Event (or Webinar) Using Zoom

Online fundraising events can be great money-makers. Get started with these tips.

Social distancing doesn't have to derail your fundraising events, though it does require a shift to a digital mindset. Zoom Business will help you set up a URL for your events and will walk you through the process if you're new to it.

Keep Audiences Coming Back

You'll want to host the kind of events that will keep people coming back for more on a regular basis. Use these ideas to get your imagination juices flowing:

Don't make it only about your organization.

Feature people you have empowered, volunteers who have made a difference in their community, or retrospectives on how projects from years ago have made a difference. Good stories pull on the heartstrings, and having people tell their own stories will resonate with potential donors.

Record it.

Be sure to record the event and encourage people to share it. Make it available online.

Too often, organizations host an event or webinar, then archive it and it's never seen again. Create evergreen events that can be shared on social media, your website, YouTube, and Facebook. With Zoom Cloud Recording, you can easily record and post your events and webinars online.

Find the right background.

Cluttered kitchen or office settings aren't effective for fundraising events. If possible, invest in creating a brand-

> Zoom Cloud Recording makes it easy to post your events online.

related virtual background or use one of Zoom's custom backdrops. If you don't have the budget to invest in a sophisticated backdrop for the chroma key function, a solid green bedsheet taped to the wall will do.

Don't hide behind wordy PowerPoint presentations.

If you want to screen-share a slide deck, use visuals only for the most impactful points, like dollars raised, people helped, and change realized. If you've ever read along with a PowerPoint and lost interest in the speaker, you'll understand why.

Make it interactive.

Zoom makes it easy for presenters to take polls of audience opinions on topics of their choice. Even if your audience isn't outspoken enough to ask questions, most will be willing to participate in an anonymous poll.

You can use these surveys to emphasize points you're making or to gather input on an emerging topic. A poll is also a great way to get ideas for new topics for future events, webinars, and other interactions with prospective donors.

Keep to a regular schedule.

A regularly scheduled event will use the same URL and phone number, so it makes sessions easier to schedule for your audience, speakers, and hosts. Keeping to a schedule also helps people plan for your events. If you connect with your donors every second Thursday, for example, they can keep room for you in their calendars. If you move event times around, they may become frustrated and stop responding.

Stay on brand.

Zoom offers organizations with more than 10 hosts a special landing page, header, footer, and personalized e-mail notifications. If you don't need an account with as many as 10 hosts, you can invite your audience from your own e-mail marketing application (sumac.com/email-marketing).

> Good stories pull on the heartstrings.

Have multiple co-hosts.

Co-hosts can support each other through awkward silences, help each other control the cadence of the call, and mediate Q&A sessions. And of course there's the immense value of moral support.

Don't forget.

Remember to offer a strong call to action to drive donations. Do so throughout the event, and emphasize it again at the end, along with information on your next event.

Zoom Information for Your Technical Team

Many nonprofits use Zoom for internal meetings as well as events and webinars. You can use Zoom's API and SDK offerings to build integrations into your fundraising and payment processing platform. The Zoom Marketplace offers pre-built integrations into apps like Gmail, Outlook, Zapier, and PayPal.

P.S. You may have heard of Zoombombing, which takes place when hackers join Zoom meetings without passwords through Zoom links. Some cyber thugs have posted offensive pictures, acted inappropriately, or otherwise disrupted conversations. Zoom increased their security protocols and safeguards recently. Review Zoom's Privacy and Security page to understand how your events and your audience's data are protected. The Anti-Defamation League (adl.org) offers some great tips to prevent Zoombombing.

This article was prepared by the team at Sumac Research (sumac.com). Sumac provides customizable CRM software built specifically for nonprofits.

A Digital Focus on Fundraising Events

Marry your old-time events with new technologies and you can end up with the best fundraisers you've ever had. Start with these articles at NonprofitWorld.org:

Seven Fundraising-Event Strategies for Challenging Times (Vol. 28, No. 1)

Connecting through the Camera & Keyboard (Vol. 38, No. 3)

Make Your Event Sponsorships Stick Without Backbreaking Labor (Vol. 36, No. 3)

Use Humor to Conquer Zoom Fatigue (Vol. 39, No. 1)

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

Zoom Exhaustion Is Real: How to Find Balance & Stay Connected (Vol. 38, No. 3)

Event Planning Can Be Easier If You Follow These Steps (Vol. 28, No. 5)

How Well Have Nonprofits Weathered the Crises of the Past Year?

The turmoil of the past year has renewed questions of nonprofit resilience through the lens of major, widespread social disruptions. *Resilience in 2020: Field Research on How Nonprofits Are Faring Amid Crisis and Disruption* (published by the National Center for Family Philanthropy, available electronically at ncfp.org/knowledge/resilience-in-2020), describes a survey which concludes that those best able to weather the storms had some things in common:

- **They were honestly committed** to their missions.
- **They remained rationally focused** yet agile.
- **They communicated openly** to diverse stakeholders.
- **They tended to the cultivation and stewardship** of relationships, internally and externally.

The report explains how these factors worked in six examples of resilient organizations. While this report relied on a small sample of nonprofits, the cases provide clarity about how resilience can help organizations through tumultuous times.

The disruptions of 2020 were indeed difficult for nonprofits. The upheavals will have long-lasting effects, but they also spurred organizations to become more strategic and innovative. This report goes a long way toward showing how nonprofit organizations can meet the challenges of the new normal of constant adaptation.

—reviewed by Terrence Fernsler

Put Your Intuition to Work

Intuition, from the Latin *intueri*, means to look inside. We're all born with the power to look within ourselves and use our intuition to make good choices. In *Put Your Intuition to Work* (Career Press, careerpress.com), Lynn Robinson outlines some of the myriad ways to read this valuable tool, including:

Notice nudges. Rather than occurring in a blinding "aha" moment, insights more often come as tiny "nudges" that make you think, "Hmmm. That's interesting." For instance, you may notice that you keep hearing about a certain organization or thinking about a particular person. When this happens, write down the thought and make a note to follow up. Your intuition is likely giving you a nudge toward a new opportunity.

Give yourself a performance review. If things aren't going well, put some perspective on the situation by asking questions such as: What can you learn from this? What are you doing right? What do you wish you had done differently? What aren't you listening to? Are there warning signs you're ignoring? Is it time to ask for advice or alter your course?

Ask for an image. If you're trying to make a decision, close your eyes and ask your intuitive self for a symbolic picture of the solution. Intuitive answers often come through visual images.

Get physical. Go for a walk, do some jumping jacks, or simply stretch your body. Just getting up and moving will bring more oxygen to your brain and help you think more clearly.

The Power of Inquiry

When you need a breakthrough, you have a valuable tool always available at your fingertips: questioning. But, while it may seem simple (doesn't everyone know how to ask questions?), research has found that you'll get better results if you approach questioning in a systematic way.

Drawing on that research, Warren Berger has discovered the best sequence in which to approach questioning. In *A More Beautiful Question* (Bloomsbury, bloomsbury.com), he details three steps to effective inquiry:

1. First ask, Why?

The place to begin is with the most fundamental of all questions: Why? For what purpose? For example: Why are we doing this the way we are? Why does this situation exist? Why does it present a problem?

2. Then ask, What if?

Once you have an answer regarding your purpose, it's time to come up with solutions. It's helpful to frame your next questions as, What if . . . ? Examples: What if we did something completely different, or did the same thing in a whole new way? What if cost and time weren't issues? What if we looked at this situation not as a problem but as an opportunity?

3. Finally, ask, How?

This is when you turn your ideas into reality. You figure out *how* you'll create change in the real world. Word your questions with care, Berger advises. Instead of asking, "How *can* we do this?" or "How *should* we do it?", it's more productive to ask, "How *might* we do this?" *Can* and *should* are judgmental words, while *might* opens up possibilities and leads to constructive solutions. For instance: How might we decide which one of our ideas to pursue? How might we test that idea, to see what works and what doesn't? If our idea doesn't work, how might we figure out what's wrong and fix it?

It's also necessary to "question the question," Berger tells us, to be sure it's not based on incorrect assumptions or biases. Here are a few of the practical ways he suggests to make sure you're asking the right question:

Ask five times. Asking "Why?" five times in a row is an excellent way to get to the root of what you need to be asking. Example: (1) Why didn't we get that big gift we were counting on? *The solicitation team bungled the "ask."* (2) Why did the team do a poor job asking for the donation? *They didn't understand the subtle details of how to ask.* (3) Why didn't they know how to ask? *They weren't well trained.* (4) Why weren't they trained properly? *Because we haven't offered much training.* (5) Why not? *Because we haven't made training a priority.*

Broaden or narrow the question. You might ask, for example, "What if we expanded this idea beyond our own community?" Or "What if we tried this in our community before going global?"

Open and close the question. For instance, suppose you find yourself wondering, "Why is the board president so hard to get along with?" If you restate this as a closed yes-or-no question ("Is the board president hard to get along with?"), you can see the faulty assumptions underlying it and perhaps ask a different question: "Why is the board president so hard for *me* to get along with?" Likewise, you can open up a yes-no question (moving from "Do you have a great team?" to "What makes your team great?") Doing so provides more space for reflection, engagement, and exploration.

Take your question into the real world. Sometimes the only way to realize you've been asking the wrong question is to see how it survives contact with reality, Berger notes. You might create a pilot program, a trial run, a simple prototype, or anything that will bring your idea into contact with real people. They're the ones who will tell you if you're on the right track and asking the right questions.

How Will Your Office Space Evolve?

After a year of facing up to COVID-19 disruptions, organizations across the country are reimagining their office designs to thrive in our new reality. Three mindsets have emerged, according to Ryan Caffyn-Parsons, Managing Director, Americas, Unispace (unispace.com):

Traditional cultures are grounded around in-person environments with a low investment in virtual working and higher investment in physical work environments.

Progressives cultures are flexible and promote a hybrid work model with employees being comfortable working remotely or in offices. Investment for this model will equally be split in the virtual and built environments to support hybrid work models.

Visionary cultures encourage autonomy and remote work with employees who come into the office as needed. Such a culture includes a significant spend in technology to enhance the virtual environment and to monitor productivity and performance.

Regardless of your strategy – scaling, adapting, or staying the same – the pandemic has altered the workplace landscape as we know it. Sanitization processes, working from home, and virtual communication are here to stay, as Caffyn-Parsons tells us.

Many organizations are increasing collaborative hubs and bringing back some private offices or quiet areas, providing staff with a place to go to work and build relationships. They're repurposing offices to align with work modes and conducting 60-day utilization studies to see if these new workplace designs are effective.

Larger organizations are adopting strategies like maintaining a hub but adding spokes (hub & spoke model). This allows them to expand their footprint, providing staff with much-craved collaboration, culture, and connection in spoke locations. We're seeing hubs emerging to support board related tasks, client meetings, and leadership-driven activities, says Caffyn-Parsons.

With the shift to greater flexibility, technology is going to play a critical role. As technology continues to power collaboration in the workplace, from video meetings to AI wearables and VR presentations to smart whiteboards, it's likely work styles are going to shift into more team-oriented environments. In turn, offices will need to be outfitted to support in-person and remote workers, providing them with the technology and space to seamlessly connect.

What should be your next move? Research is saying space will be used differently, but what's the right strategy for you? Before making permanent, long-term decisions, use pilot spaces and employee surveys to learn what will work best for your people, Caffyn-Parsons suggests.

Whether it's a long-term commitment to remote work, embracing a flexible model, or taking a wait-and-see approach, leadership communication and change management will play an essential role in navigating the new workplace. Outlining clear protocols and processes can guard against burnout, help manage meetings and communication expectations (in-person and virtual), and coordinate teams to make sure they're driving the right outcomes. As digital innovations continue to emerge, virtual sharing and collaborating will increase, causing reimagined horizons.

Being Agile in an Uncertain World

Agility is a key trait for today's leader. Four books from J. Ross Publishing (jrosspub.com) clarify the importance of being agile in an era of rapid change:

Metagility defines agile organizations as those that respond successfully to a turbulent environment. The book shows how to use agile concepts to best advantage.

Project Interface Management describes how to reduce risk on major projects.

Strategic Supply Management Revisited covers the issues of complexity and the inevitability of risk. This book details how an agile organization can overcome these challenges.

Agile Business Analysis reviews agile best practices.

As these informative books explain, an agile organization will make changes such as these:

- **Accelerate the pace** of technical development.
- **Expand access** to technology.
- **Increase** globalization.
- **Use methods** such as outsourcing to conserve resources.
- **Measure** results constantly.

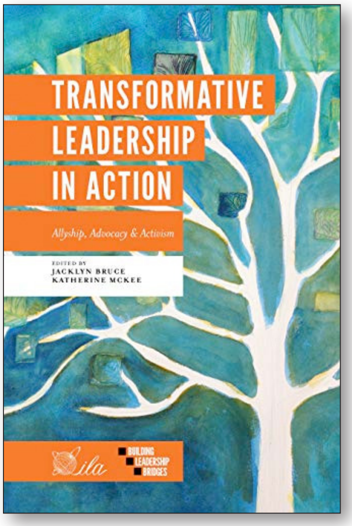
The number-one secret ingredient to an agile organization is having a motivated, competent workforce. Leaders who manage agile teams need:

- **a servant-leadership mindset,** always asking the question, "How can I help?"
- **exceptional communication** skills
- **the ability** to build trust
- **humility** and flexibility
- **a positive** outlook.

All four books contain practical, hands-on tools, including extra materials available for download. These online resources include worksheets, templates, spreadsheets, assessment tools, and interactive variations of what is in the books. These tools are enormously helpful in giving readers a chance to apply what they learn.

Looking at Leadership in New Ways

We can define leadership in many ways. In Western culture, we've tended to see it as an individual attribute. Recently, however, this view has given way to more of a relationship orientation. We see our leaders as those who influence change through sharing, learning, and participation.



Transformative Leadership in Action (Emerald Publishing, emeraldinsight.com) explores these and other dimensions of leadership. It examines how transformative leaders create inclusive groups and become allies in justice with marginalized people.

Such leaders choose actions that add diverse perspectives and promote equity. They're courageous enough to be flexible, cede power to advance participation, and accept ambiguity. Theirs is a vision that includes the abilities of everyone in an organization. It is leadership that serves to catalyze, not command.

We have it within our nonprofit organizations to change beliefs about what leadership means. The challenges of wicked problems demand leading in new ways that involve whole systems. Participatory practices can expand our concept of leadership, and *Transformative Leadership in Action* can help us become more effective through inclusive leadership.

—reviewed by Terrence Fernsler

What's the Fundraising Outlook for This Year & Next?

There's good news to share. Giving is up – right now – across the board, says fundraising expert Gail Perry (gailperrygroup.com).

Giving was up 10.6% in 2020 over 2019, and it's set to continue on an upward trend this year and next. "Some of the best news is that small donors, who provide much of the sustainable annual giving for many nonprofits, are returning." Perry tells us.

Giving levels follow the U.S. stock market. When the stock market rises, charitable giving also goes up. "We find that when donors' portfolios are growing robustly, then donors feel more wealthy," Perry says. When your donors are feeling wealthy, their charitable gifts often increase.

Estate gifts and high-net-worth gifts are also projected to rise over the next couple of years. These trends, again, are because of the robust stock market. They're based on the assumption that the stock market and economy will continue on a positive trajectory.

The worrisome news is that donor retention has plunged to a low of 43.6%. Donor loyalty continues to be one of the greatest challenges of many fundraising programs.

What does this forecast mean? It means there's hope for increased donations, but you need to work hard to delight your current donors. Keeping your donors happy is easier and more profitable than seeking new donors.

It's time to staff back up fully, and invest in your fundraising program, Perry advises. It takes a fully funded and staffed fundraising office for your organization to take advantage of this robust economy and the rising stock market.

"Keep a sense of optimism and possibility about your fundraising," Perry urges. "When donors' portfolios are growing, they feel wealthy – and charitable." Don't miss this opportunity to ride the economy on its upswing.

Beyond the Briefs

To explore issues raised in these briefs in more detail, take a look at these articles (NonprofitWorld.org):

Boost Your Organization's Resilience (Vol. 38, No. 3)

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

Leading from Feeling (Vol. 27, No. 1)

How to Coach People through Stress: Use Reflective Inquiry for Best Results (Vol. 38, No. 4)

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

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

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