

volume 39 • number 3

Nonprofit World

Advancement
Through
Sharing

Employee Feedback Is No Longer Optional

Satisfy people's demand for dialogue



PLUS: Watch Out for These Legal Risks: Liability Concerns following COVID • Are You Sure You're Training the Right Things? • Beware These Red Flags of a Toxic Hybrid Workplace • Listen Your Way to Major Gifts: Power Questions Your Donors Will Love • Fostering Organizational Resilience • How to Move to a Governance Board in Five "Easy" Steps • Avoid Internet Dangers: Practice Safe Surfing and Defensive E-Mail • Build a Winning Workplace Culture • Are You Breeding the Conditions for Fraud to Occur? ... **and more**

Published by



NONPROFIT WORLD

Editor **Jill Muehrcke**

SOCIETY FOR NONPROFITS

President **Jason Chmura**

Board Members

Laurie Ballard

President/Founder, LMB Development Consulting
Troy, New York

William Carnegie

Regional CEO, Big Brothers Big Sisters
Southern Lake Michigan Region
South Bend, Indiana

Danyelle Donsunmu

Grant Writer, Beyond Housing
Florissant, Missouri

Diane M. Hults

Finance Accounting Consultant
D Hults Consulting, LLC
Beverly Hills, Michigan

Seth Schalet

CEO, Santa Clara County FireSafe Council
Saratoga, California

Tony Spearman-Leach

Director of Development and Philanthropy
The National Academy of Public Administration
Washington, DC

Annisia Wanat

Principal/Consultant, AMW Solutions
Chicago/Moline, Illinois

Director Emeritus

Katie Burnham Laverty

Temecula, California

Editorial Advisory Board Members

Jason Chmura

President, Society for Nonprofits
Livonia, Michigan

Amy Good

Dane County Humane Society
Madison, Wisconsin

Tangie Newborn

President, Immense Business Solutions
Washington, D.C.

Amy Sample Ward

CEO, NTEN (Nonprofit Technology Network)
Portland, Oregon

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.

No part of this publication may be reproduced without written permission. All rights reserved.

Copyright © Society for Nonprofits 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

Today's workers are hungry for feedback. They want to hear what you think about what they're doing, and they want to give you their input in return. What does it take to maintain this ongoing give-and-take? How can you balance constant conversation with your other responsibilities? In **"Employee Feedback Is No Longer Optional" (page 14)**, executive coach Kate Zabriskie provides the keys.

ARTICLES

- 14 FEATURE STORY: Employee Feedback Is No Longer Optional**
By Kate Zabriskie
The best way to create a productive, engaged workforce? Take time to sit down and talk.
- 16 Beware These Red Flags of a Toxic Hybrid Workplace**
Remote-work experts share warning signs that an organization isn't prepared for hybrid work.
- 18 Are You Sure You're Training the Right Things?**
By Dan Black
Don't waste time and resources on training that nobody wants.
- 20 Build a Winning Workplace Culture**
By Magi Graziano
Look, first, at yourself.
- 22 Are You Breeding the Conditions for Fraud to Occur?**
By Steven M. Braunstein
Fraud in nonprofits is alarmingly frequent. Keep it from happening by shaping a fraud-prevention environment.
- 24 Overcome Unconscious Bias in the Hiring Process**
By Molly Brennan
Boost diversity and productivity with these recruiting tips.
- 26 Fostering Organizational Resilience**
By Emily Stumhofer & Erin Gloeckner
Weather storms by building resilience into all corners of your organization.
- 29 Increase Donations with Google Ad Grants**
By Armina Fareed
You can't go wrong if you follow these steps.

contents

volume 39 • number 3 • 2021

DEPARTMENTS

- 2 editor's page**
A New Set of Eyes
By Jill Muehrcke
Creativity is 20% inherited and 80% learned.
- 2 Five Things to Do Next Monday**
- 3 fundraising forum | Listen Your Way to Major Gifts: Power Questions Your Donors Will Love**
By Gail Perry
Use these questions to listen your way to a major gift.
- 5 Know the Facts about Fundraising Today**
- 6 ask the experts | Is It OK for Former Staff to Visit on the Sly?**
By Terrie Temkin
What should you do if ex-employees keep stopping in while you're away?
- 8 people & technology**
Avoid Internet Dangers: Practice Safe Surfing & Defensive E-Mail
By Barbara Oliver & Walter Light
The information highway may hold more pitfalls than you realize.
- 10 legal counsel | Watch Out for These Legal Risks: Liability Concerns following COVID**
By Nicole M. Jolley
Take care not to let your guard down too soon.
- 12 the board room | How to Move from an Operational to a Governance Board in Five "Easy" Steps**
By Karen Eber Davis
Use these tactics to create the crucial boundaries every board needs.
- 13 relevant reviews | Joining Together for a Sustainable Future**
By Terrence Fernsler
Two books highlight the benefits of cross-sector partnering.
- 32 nonprofit briefs**
Build a high-performing fundraising team. An exercise to spark creativity. Plus other tips, research, and publications in the nonprofit sector.



NONPROFIT WORLD
is published by the
Society for Nonprofits.

A New Set of Eyes

“You can be as creative as you want to be,” says Bernhard Schroeder in *Simply Brilliant* (harpercollinsleadership.com). Even if you’ve been pegged as lacking in imagination, you can cultivate an innovative mindset.

Despite what many people believe, creative ability isn’t a matter of genetics. Nor is it a mysterious gift. Research has concluded that creativity is 20% inherited and 80% learned. “People who have confidence in themselves and work hardest on a problem are the ones most likely to come up with a creative solution,” Schroeder says.

Creativity depends on teamwork. To encourage innovation, it pays to build diverse teams whose members span a range of work experiences, education, ethnic heritage, and personal backgrounds. To create such a team, see “Four Steps toward Transformative Learning” on page 33.

Working together to brainstorm solutions to problems has a way of yielding remarkable results. The key is to ask the right questions – what Schroeder calls “simple, smart questions.” Such questions are open ended and not leading. For examples, take a look at “Questions Matter” (page 32) and “Employee Feedback Is No Longer Optional” (page 14).

Simply Brilliant explains the ingredients for brewing a creative culture. Examples: Offer flexible work hours and unlimited vacation days (Netflix does it), reward risk-taking, and allow plenty of room for disagreement. “Build a Winning Workplace Culture” (page 20) offers a straightforward formula for putting these lessons into practice.

Another fundamental for such a culture is resilience (see “Fostering Organizational Resilience” on page 26). Other factors that will strengthen your workplace include training (“Are You Sure You’re Training the Right Things?” on page 18), vision (“Creating a Vision,” page 32), and financial savvy (“Build a High-Performance Fundraising Team,” page 32).

Perhaps the most essential element of all is collaboration. In *Your Creative Mind*, Scott Cochrane explains why collaboration is all-important and how you can attract valuable collaborators. It’s often just a matter of looking at what’s around you with the right set of eyes.

He cites an example of a director at a business school who was frustrated with the fundraising goal she’d been given and felt she had no support in the enormous task. He asked her: How many local businesses are “partners” with the business school? How many graduate students do you have?

The questions ignited her imagination. As a result, she started a speaker series with local businesses that served as an ongoing fundraiser. In conjunction with the speaker series, she began a volunteer program for graduate students who wanted experience and a chance to interact with the

“Creativity is 20% inherited and 80% learned.”



leaders who would be speaking. Simply by looking around her with different eyes, she began several collaborations that benefited everyone involved.

Cochrane’s book is a treasure trove of ideas to help people “disrupt their thinking” so they can develop bold new initiatives. One such activity, which is both simple and powerful, is detailed in “An Exercise to Spark Creativity” on page 33.

The techniques Cochrane describes are, in a sense, ways to rearrange reality. Great leaders use such strategies to help people question assumptions and avoid doing what they’ve always done. Such leaders understand that creativity begins with how they think about the environment around them and, above all, how they think about themselves.

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. **Choose one of the board-boundary tactics** outlined on page 12 to use at your next board meeting.
2. **Check your calendar** to be sure you’ve scheduled conversations with your employees into your plans, as described in “Employee Feedback Is No Longer Optional” (page 14).
3. **Take the strengths assessment** suggested in “Bouncing Back” (page 27) so you can use your strengths to best advantage.
4. **Share the cautions** in “Avoid Internet Dangers” (page 8) with your staff to avoid the dangers inherent in using e-mail and the web.
5. **Plan to meet** with one of your donors, and brush up on questions to ask when you get together (“Listen Your Way to Major Gifts,” page 3).



Listen Your Way to Major Gifts: Power Questions Your Donors Will Love

Use these donor-centered questions to gain major gifts.

By Gail Perry

Here's a natural, friendly, and successful approach to major-gift fundraising. It's a way to develop warm, easy relationships with your major-gift prospects – relationships where they feel heard and understood, relationships that build trust and credibility.

Why Ask Questions?

When you ask donor-centered questions, you let donors lead the way. They feel entirely in control. They don't feel "presented to" or pushed. As a result, they're much more likely to give generous donations from the heart, and they'll be with you for the long term.

This is a conversation to have with people who are already donating to your organization (although many of the questions will work with any prospective donor). With these questions, you're accomplishing two important things:

You're deciding whether to ask current donors to give a bigger gift – to become major donors. With this approach, you're continually "qualifying" donors in terms of their interests. Should you continue to invest time with them? Or should you turn to another donor prospect?

At the same time, these conversational questions will inspire your donors, build their interest, and open the asking conversation.

Which Questions Should You Ask?

Here are 10 questions that will make the most of your time with major-gift prospects:

1. What inspired your gift?

We do a lot of explaining and sharing information with our donors. But we don't ask donors to talk to us enough.

Think of yourself as a detective. Your donor has contributed to your nonprofit for a specific reason. It's up to you to find out why.

It may be something in her past. It may be a friend who is influencing her interest. It may be that your message caught her interest. It could be something deep in her heart, part of her personal moral values.

When you discover why your major-gift prospect made a gift, you can create a deeper stewardship experience for her. You can acknowledge and thank her in a personal way that speaks to her uniquely.

CONTINUED ON PAGE 4

2. I'd love to know your story.

Your donor has an amazing story to tell about why she cares. She's probably dying to share her story. But no one is asking.

This question helps you find out if your donor is a wildly passionate True Believer in your cause.

Just how interested or enthusiastic is she – or not? This question helps you qualify your donor and determine if you should spend more time with her – or focus your efforts on someone else.

3. Then what happened?

You really do want to know as much as you can about your donors. Encourage them to keep talking by asking this question. Remember, you honor your donors by listening to them.

No one listens any more. You are making a gift to your donor of your presence – by holding the space for her to share details about her story.

4. What are your impressions of our organization?

Asking people for their “impressions” gives them a wide open door to share whatever is at the top of their minds. What do they really think about your nonprofit, your colleagues, and your own work? Are they satisfied with their interactions with you? Just how committed are they? Asking this question is like opening a box of chocolates – you never know what you're going to get!

You may be surprised by their answers. Only by finding out what's on their minds will you be able to move forward in trusting relationships that might culminate in major gifts. You'll also get clues on how to design personalized experiences that will engage them and make them happy.



“Think of yourself as a detective.”

5. How did you come to be so generous?

This question is from the very smart Kent Stroman's book, *Mastering the Art of Conversational Fundraising*. It's a great question because it will tell you about your prospects' priorities. What organizations are they giving to? What are their commitments? Who else may be influencing their giving decisions?

If you want to design a successful ask, you need all this information. Again, you don't want to assume that people are “A” level prospects when they're really “C” or “D” levels because they're committed to other causes.

Most major-gift prospects are happy to share their philanthropic vision with you and they appreciate being asked. It creates openness and trust when you discuss these issues. They'll be flattered that you consider them “generous” – and will want to live up to that characterization by displaying their altruism.

6. Ask for advice and input with questions such as these:

- **How can we fund** this project for the community?
- **Who should be** at the table?
- **Who would be good donors** to support this effort?
- **Who can open the door** and make an introduction?
- **Do you think a certain donor** in our community would be interested?

These questions engage people in the strategy part of your fundraising effort. When they start offering advice and assistance, they feel like insiders. In a way, they join your team. Their interest grows as they strategize with you. Plus, their advice is likely to be very helpful.

7. Could you see yourself becoming more involved in our organization?

People may ask what you mean by this question, and you can mention all the areas of potential involvement, such as volunteering, serving on a committee, or becoming more financially involved. They'll tell you what they're interested in doing – but only if you ask.

8. If you made a major gift, what would you like to accomplish?

When you have engaged, interested donors who have the capacity to give, it's perfectly fine to ask them this question outright. You are, in fact, a fundraiser. And your role is to “facilitate” your donors' interest in giving to your organization. It's your job. Of course you should be having discussions like this with your donors.

“You honor your donors by listening to them.”

Make no mistake, your donors probably have very clear notions of what they want to accomplish. They’ve probably been pondering this question all along.

9. What part of our work interests you most?

Now it’s time to get specific. Exactly what part of your work is your donor most passionate about? Is it the kids? Is it the whole family? Is it your service network or finances? You never know until you ask.

Many fundraisers make the mistake of assuming their donor’s area of interest – and then they’re surprised when the donor says no to an ask.

Once you find out people’s interests, you can help them learn more and more about their favorite areas. They’ll enjoy what they’re learning as they get more and more involved.


When you find out people’s passions and interests, you can design personalized experiences that will delight them and bring them joy. Then it’s easy to ask the tenth, all-important question.

10. Would you like to know more about how you could impact this project?

This is the “permission to ask” query. All your earlier questions lead up to this one. It’s an important question, because it clearly opens the ask conversation.

Always “ask for permission to ask.” That lets donors lead the way. If they’re ready to have this discussion, they’ll let you know. And presto! You’re discussing how much they want to donate.

Typically, a donor will say, “Sure, I’d like to know how I could make an impact.” And you can have some suggestions at hand. Be ready to provide gift suggestions at three different levels. For example, “Well, you could help 100 more kids with a gift of \$xxx, or you could help us expand our reach into a new city with a gift of \$yyy, or you could endow our program area and make sure this work is continued for good, with a gift of \$zzz.”

Then sit quietly and let the donor consider these options. You’ve developed an open, trusting relationship by carefully listening. Once the idea of a gift is on the table, keep listening to your donor’s ideas, and answer any questions. You’ll know what the next steps need to be. Pretty soon you will have closed the gift. You’ll have a happy donor and new funding for your mission. 

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.



Know the Facts about Fundraising Today

Many nonprofit leaders and board members don’t realize how fundraising has changed. Their fundraising goals and tactics are mired in the last century.

Here are the facts:

1. **Today’s donors** have no attention span.
2. **Small gifts** are dropping away.
3. **Mega gifts** are increasing.
4. **Boards often stand in the way** of fundraising success.
5. **Fundraising teams** are chasing too many different strategies.

Watch for “Top 10 Things to Understand about How Fundraising Really Works Today” in the next issue of *Nonprofit World*. We’ll help you get everyone in your organization on the same page about what fundraising is and isn’t. Our guide will provide you with a coherent set of strategies that everyone can agree on.

Continue Your Major-Gift Journey

Learn more about asking for gifts and relating to donors with these articles from NonprofitWorld.org:

- What to Do When Your Potential Donor Says No** (Vol. 36, No. 3)
- Turning the Direct Ask into Gold** (Vol. 30, No. 1)
- Debunking the Myth of Bill Gates: Finding Major Donors** (Vol. 16, No. 2)
- How to Foster a Positive Funding Relationship** (Vol. 32, No. 4)
- What’s the Best Way to Recognize a Major Donor?** (Vol. 31, No. 2)
- How to Impress the Wired Wealthy** (Vol. 30, No. 3)
- The Perfect Gift for a Major Donor** (Vol. 36, No. 1)
- The Word You Hear Most Often in Fundraising** (Vol. 28, No. 4)
- Top 10 Trends: How Major Donors Are Changing & What to Do about It** (Vol. 31, No. 4)
- Be a Better Leader by Being a Careful Listener** (Vol. 37, No. 1)
- Your Board Can Help You Gain Major Gifts** (Vol. 39, No. 2)

Is It OK for Former Staff to Visit on the Sly?

What should you do if ex-employees keep stopping in while you're away?

Q I've served as the CEO of a small nonprofit for the past 10 years. During this time a number of factors – including the economy, changes in programs dictated by the strategic plan, and advances in technology – have driven several reorganizations.

As a result, there have been many personnel changes, including staff being moved into new positions or transitioned out of the organization. I've made every effort to help employees who were affected by these changes. I've also remained friendly with most of the former staff.

In recent weeks, I've discovered something surprising. I've learned that when I'm out of town on business or vacation, former employees are coming to the office to see colleagues, and that this has been happening routinely for years.

While I think it's great that employees have stayed in touch and supportive of one another, it's disconcerting to me that former staff members are dropping by only when I'm away from the office and that current employees consistently "fail to mention" the visits either before or after they occur. Rather, I learn of them second or third hand or, as in the most recent incident, when a question arose and a staff member replied, "Well, when Jane stopped by to visit while you were gone, she said . . ."

I'm trying to be understanding and supportive, yet there's part of me that feels uncomfortable with people stopping by like this. I'm also a little uncomfortable with current staff being less than forthcoming about it. What are your thoughts on this situation?

A Your discomfort is understandable. You've bent over backwards to help former employees transition into other work, you've remained friendly with them, and they come back only when you're away. Neither they nor your current staff have volunteered that this is happening, let alone on a regular basis. On some level you must be wondering about the nature of the visits given that everyone is being so secretive.



My guess is that there is little going on here besides the fact that these are social calls occurring during work hours and people are feeling a little guilty about that. I say this because you've learned that the visits have been going on for years and you haven't noticed any reduction in work levels or respect – at least you haven't mentioned any.

Still, I would definitely raise this issue with your staff in a meeting. I would share that you're happy they've formed such tight bonds that they want to maintain these connections even after someone leaves. That sort of friendship makes for the strong working relationships that have sustained your organization through all the turbulence. However, even more essential to a good relationship is trust, and right now you've lost some of that trust because, while you don't believe anything untoward is going on, you do have to wonder why these visits only occur while you are away and you're never told about them.

It might not hurt to remind employees that they have a duty of loyalty to the organization that prohibits them talking about the organization's activities with people who no longer work there, even though these individuals are probably naturally and sincerely interested. Even if your employees don't talk about organizational matters, their old colleagues might see something confidential sitting out on a desk, or overhear private information being discussed in an adjoining cubicle.

I might ask staff members whether they've considered liability issues that could arise if something should happen and these visitors had no legitimate reason for being there. You would be in an untenable position – responsible for the situation despite having no prior knowledge of the visitors' presence.

Since you've always treasured your relationship with these people, perhaps you could arrange an organization-wide event to which you invite all former staff members. You could do so every quarter or at whatever interval seems most appropriate to you. Maybe it's a birthday party for everyone who has had a birthday since the last get-together,

“Have staff members considered liability issues?”

a holiday party, or even a happy hour if that isn't inconsistent with your mission.

You can assure your employees that you're not trying to dictate who they can see, or when. You're just asking that, if they wish to go to lunch with former staff, they meet at the door.

I would be very clear that, while they couldn't have known your feelings on this issue before, they do now. If you find that someone doesn't adhere to these requests in the future, you'll take quick and decisive action because this would be a betrayal of your trust. I would then codify this in a written policy.

Finally, raise this issue with the former employees as well. Call each one individually. I might start off with expressing regret that you've missed the opportunity to see them when they've stopped by in the past and that you're glad to know they formed such tight bonds while they were part of your organization.

If you decide to host get-togethers, this would be a good time to let them know that they're invited and you sincerely hope that they'll be able to join you. I would go on to say that for many reasons, you now have a new policy that closes off your building to visitors – even those who used to work there – and you trust that they'll understand.

All this stated firmly, with warmth and some humor, should be accepted without too much grumbling. If you find it's not, you have a much larger problem than ex-employees visiting while you're away.

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



please get in touch...

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

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

E-mail to: muehrcke@charter.net

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

Avoid Internet Dangers: Practice Safe Surfing & Defensive E-Mail

The information highway may hold more pitfalls than you realize.

By Barbara Oliver & Walter Light

No matter how many firewalls, virus protection programs, and anti-spam devices protect your organization's computers, an enemy can invade. This is a perfect time to ask your staff to adopt safe surfing and e-mailing practices. Share the following tips with them.

Safe Surfing

Internet research is indispensable, but there's a downside: You may accidentally travel to websites you very much *don't* want to visit! To avoid such problems, be sure you and others in your organization follow these guidelines:

Proofread the URL you type into the search engine *before* you hit "enter." Many common misspellings and letter transpositions will take you places you don't want to go.

Narrow your search: Google, for instance, has an advanced search that lets you indicate the main category (funding sources), a second subset (to nonprofits), and sub-subset

(Texas). You can also specify language, date, occurrences (where it appears on the page), domains, and "Safe Search" (to block adult sites). Take a few minutes and get familiar with the advanced search features in the site you normally use. Also check out the advanced search features on dogpile.com, altavista.com, webcrawler.com, yahoo.com, and askjeeves.com.

If you download files or programs from the internet, be sure they're from a trusted source, and scan them for viruses before opening them. When in doubt, jot down the URL and ask your IT person before you download.

Update your virus definition files regularly. Set your computer to update automatically at a time when your computer will be turned on. In addition, you may wish to update these files manually if someone in your organization receives a virus, if you hear about a new virus replicating through computers, or if people you e-mail regularly tell you they've received a virus.



“Spam messages wouldn't keep coming unless people were opening them. Don't let any of these people be your staff members!”

Defensive E-Mail

By now we all know there's no money waiting for us in Africa if we supply our bank account numbers. However, spam messages wouldn't keep coming unless many people were opening and answering them. Don't let any of these people be your staff members! Be sure they pay attention to the following warnings:


Before opening an e-mail from an unknown person, check that the subject line is legit. Be alert to strange spellings or symbols added to words (i.e., D!scout C1a,l!s). Don't waste your time adding the e-mail addresses to your e-mail blocker's "black list"; the next message most likely will come from a different address.

If you receive an unexpected e-mail – even from someone you know – don't open it. Ask the sender (via e-mail or phone) if the attachment is legitimate. If you can't verify legitimacy, delete the e-mail, then write the sender an e-mail telling them you've deleted the message and why.

Don't post your e-mail address on public message boards or newsgroups. If you do, you risk having your e-mail address harvested by spammers. If you must use an e-mail address on a public message board to post to the web or request online services, create a dummy address on your mail server or on Yahoo Mail. Change it when it attracts too much spam.

Disguise your e-mail address on your website to avoid having it scraped off by spammers. For example: if your e-mail address is someone@nonprofit.org, post it as "someone at nonprofit.org."

Don't respond to spam. Delete it. If you click the "Remove Me" button from the spam message, this just verifies that the e-mail address is active and opens the door for you to receive more spam.

Never provide personal information in response to an e-mail message or follow a link provided "for your convenience" in an e-mail that is allegedly from your bank, credit card company, or anyone else! To see if the message is legitimate, use your established safe shortcuts to go to the company in question. Don't under any circumstance use any links provided in the e-mail! 



Barbara B. Oliver is the former director of communications for the Nonprofit Risk Management Center (nonprofitrisk.org) and former editor-in-chief of Public Risk, a magazine for risk managers. Walter Light is a retired electronics hardware designer and naval weapons systems engineer.

Be Alert to Hidden Threats

Create plans that keep you safe from peril, using the guidance in these articles from NonprofitWorld.org:

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

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

Workplace Identity Theft: Curing the Latest HR Headache (Vol. 25, No. 5)

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

Protecting against Fraud (Vol. 31, No. 5)

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

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

Wire Transfer Fraud: It Could Happen to You (Vol. 35, No. 3)

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

Watch Out for These Legal Risks: Liability Concerns following COVID

Take care not to let your guard down too soon.

By Nicole M. Jolley

It has been more than a year since much of the United States shut down in response to the COVID-19 threat. During that time, nonprofits have had to pivot their engagement strategies, struggle through budget shortfalls, and reimagine how they can continue to live out their missions. Now that vaccines are widely available, organizations have relaxed their restrictions and reverted to “business as usual.” Be wary, however, of letting your guard down: There’s still plenty of risk for legal action surrounding COVID-19.

Here are four areas in which you should be especially careful as our nation navigates its recovery.

Children under Age 12

While vaccines are available for adults and teenagers, some families with younger children may be left out of the return to “normal.” If your organization serves children or families, be mindful the virus still is spreading among children. It’s important to reassess your mitigation efforts with some regularity given the changing landscape of the pandemic.

Your path forward largely depends on the area in which you live. If your organization is based in a region that has seen a steep decline in the number of COVID-19 cases, you might consider changing your mitigation efforts. Additionally, some states have extended laws shielding organizations from liability surrounding COVID-19. Consult your attorney as to the legal implications of how these laws impact your organization.

On the other hand, if cases have remained steady in your area, it may be too early to ease your mitigation efforts – at least in situations that include children under 12. The Centers for Disease Control and Prevention (CDC) recommends that childcare providers, for example, continue procedures related to quarantining, masking, and disinfecting.

Vaccination Requirements

While many people have been vaccinated, many others have chosen to opt out. That leaves nonprofits with a decision to make: Do they require their employees and volunteers to show proof of vaccination before performing their duties?

When making this decision, you should consult with your attorney to ensure you’re following guidance from the Equal Employment Opportunity Commission (EEOC) on your employees’ rights regarding mandatory vaccination.

“Requiring vaccinations will shield you from lawsuits.”

If you decide to mandate vaccinations for your employees or volunteers, you may be required to give them time off for the vaccination and for recovery time. You may also need to reimburse employees and volunteers for costs associated with the vaccination. While the U.S. government is using taxpayer dollars to give vaccines to all Americans, some vaccine providers may charge an administration fee. Check with your organization’s health-insurance provider to find out whether these costs will be covered.

Some of your employees and volunteers may decline the vaccine for religious or medical reasons. You should accommodate them unless you can show that doing so will create an undue hardship for your organization. Title VII of the Civil Rights Act of 1964 and the Americans with Disabilities Act (ADA) provide for exemptions from mandatory vaccination and require reasonable accommodations for employees with disabilities (including any medical conditions that would preclude an employee from receiving the vaccine) or religious objections. Employee requests for medical exemptions should be treated like any other ADA request for accommodation.

Requiring vaccinations can keep your employees, volunteers, and clients from contracting the virus on your premises. Taking this step can also give you a shield with which to defend a lawsuit. If an employee, volunteer, or client claims to have contracted COVID-19 from your organization’s premises, you can make a solid case the organization isn’t liable because you performed due diligence in ensuring all employees, volunteers, and clients were vaccinated.

Cyber Liability

Over the past year, more people have been working from home than ever before. While some organizations are bringing employees back into an office setting, others are giving them more flexibility to work remotely. Remote workers, however, increase an organization’s risk for cybercrime. Here are some steps you can take to reduce that risk:

Safeguard protected data. Protect employee, volunteer, and client data (personally identifiable information) such as

social-security, driver's-license, bank-account, and credit-card information.

Use multi-factor authentication. This provides an added layer of protection for your system.

Back up critical information. Establish a process for regular backups.

Create a policy requiring employees to use strong passwords. Passwords should have a combination of letters, numbers, and symbols, and should be different for every device or account. Employees should also be required to change their passwords regularly.

Perform background checks on all individuals who have access to your systems.

Train staff on phishing. Employees should be mindful to not open suspicious e-mail attachments or visit unknown websites.

Special Events


As the world returns to pre-COVID activities, there's still a big question mark around the right way to handle special events. Even some top-tier performing artists have shied away from planning tours because they don't want to expose themselves to the liability of causing a super-spreader event.

For many nonprofits, events of some sort are a necessity for fundraising purposes. But what's the right balance between keeping safety in mind and moving forward with your organization's day-to-day operations? According to a report from QGiv (go.qgiv.com), nonprofits are divided as to how they plan to approach special events. Only 3.5% say they plan to shift back to fully in-person events, while 23.7% will hold virtual-only events, and 28.3% are planning hybrid events.

What is a hybrid event, and why is it the new vogue? A hybrid event is one that limits the number of in-person attendees – which could make the lucky few attendees feel special enough that they're more likely to open their checkbooks. But it also gives others a chance to participate in the festivities remotely. After more than a year of virtual events, many people may be content to attend your event virtually.

From a liability standpoint, a hybrid event reduces your risks. It gives attendees an opportunity to choose how they want to participate. If they attend in person, they're doing so with the full knowledge that they run the risk of

exposure to the virus. You'll want to consider implementing a hold-harmless agreement or waiver of liability that each in-person attendee can sign before entering your event. This will lower your organization's liability risk.

As for precautions you should take at the event itself, that depends on your location and your organization's tolerance for risk. While many states have relaxed requirements on group sizes, masking, and social distancing, others still are being very cautious. Even if you believe your event falls within the given parameters, it's a good idea to communicate with local and state officials before investing money into the planning process. 

Nicole M. Jolley, CPCU, MBA, AIC, ARe, AINS, is director of Nonprofit & Human Services, Church Mutual Insurance Company (churchmutual.com). Church Mutual is a stock insurer whose policyholders are members of the parent mutual holding company.

More on Managing Your Risks (NonprofitWorld.org):

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

How Risky Is Your Special Event? (Vol. 20, No. 1)

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

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

Volunteer Management Strategies: Balancing Risk & Reward (Vol. 17, No. 3)

Use Background Checks to Avoid Legal Pitfalls (Vol. 29, No. 1)

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

Can Your Organization Afford to Lose \$100,000? Safeguards Every Nonprofit Needs to Implement (Vol. 30, No. 3)

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

Hurricanes, Strikes, Terrorism – Protect Your Events from These Causes of Loss (Vol. 28, No. 4)

Is Your Organization Lawsuit-Proof? (Vol. 20, No. 1)

Setting the Stage for an Abuse-Free Organization (Vol. 30, No. 6)

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

Trust: The Reason Volunteer Screening Is More Vital than Ever (Vol. 37, No. 3)

Risks Get Riskier for Nonprofits: ERM Can Help (Vol. 38, No. 1)

“Remote workers increase an organization's risk for cybercrime.”

How to Move from an Operational to a Governance Board in Five “Easy” Steps

Use these tactics to create the crucial boundaries every board needs.

By Karen Eber Davis

If you have an operational board (where board members micromanage the staff’s work), you may have trouble moving to a governance board (where board members focus, as they should, on strategy and governance). But it’s vital to set boundaries on the board’s work, and that means creating a governance board.

The board’s rightful tasks are few. Board members should establish policies, select and evaluate the CEO, and provide high-level fiduciary oversight. They shouldn’t be running programs, planning events, or designing brochures.

But many nonprofits struggle to maintain a true governance board. When a nonprofit is just starting out, board members often jump in to help with daily tasks, and that may make sense at first. But it sets a bad precedence for the board as the nonprofit matures.

You may think you have the problem solved. You discuss the issue with board members, and they agree to focus only on strategy and governance issues. But later – perhaps even in the same meeting – they circle back to giving unsolicited advice on running programs, hiring staff, and the like.

Here’s how to reign in board members and create a governance board:

1. Keep a Tally. Be sure board members understand that they need to focus on governance. Clarify the differences between management and governance. Then, at each board meeting, have the chair ask a different board member to keep a running tally of the time spent on governance vs. management issues.

2. Check the Agenda. Boards want to give the help you need. Make sure you give them meat to chew. Fill the meeting agenda with policy and strategy issues, not management concerns.

3. Use Reminder Prompts. When we change behaviors, prompts help. Build reminders into your meetings. You might, for example, give everyone a red card to indicate “stop.” Invite members to pull out their card when the discussion meanders into operations.

4. Insist on Short Meetings. Strategy is hard work. Long sessions lead to tired people. Tired people get cranky. Cranky people dig into details, make poor decisions, and offend others. Don’t believe me? Notice when your meetings go negative. Note the time elapsed. Nine out of ten times, you’ve passed the hour mark.

5. Turn Board Members into Evaluators. Before you close meetings, ask the board to evaluate the process used. Rotate tactics. At meeting one, ask open-ended questions. At meeting two, request anonymous answers written on index cards. Next time, hand out a quick survey. (For your survey, use a Likert-type scale, and ask three or fewer questions. Be sure to include a variation of this question: What percent of the meeting did we spend on governance versus operations?)

Your challenge today: Pick one of the board-boundary behaviors above. Apply it at your next board meeting. 

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 Tactics for a Board that Governs Well

Glean further insights in these articles at NonprofitWorld.org:

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

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

Action Steps for Effective Governance: Test Yourself (Vol. 35, No. 3)

Do Your Board Members Know Their Fiduciary Responsibilities? (Vol. 33, No. 1)

Leading and Managing Governance Change (Vol. 26, No. 3)

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

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

Increase Your Organization’s Influence in Just 15 Minutes a Month (Vol. 38, No. 1)

Joining Together for a Sustainable Future

Two books highlight the benefits of cross-sector partnering.

Reviewed by Terrence Fernsler

Corporate Responsibility Coalitions

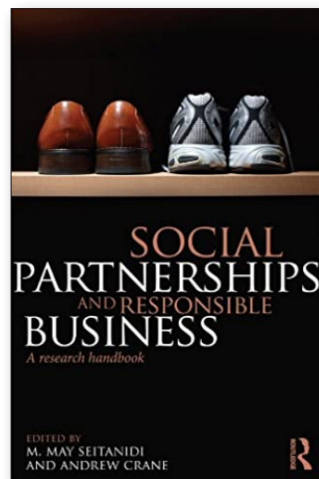
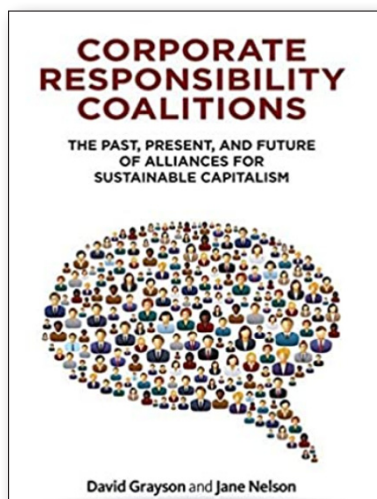
By David Grayson & Jane Nelson. Taylor & Francis Group (taylorfrancis.com).

The challenges facing our planet and humankind are greater than ever before. While corporations cannot – and should not – act alone to resolve them, businesses are such a pervasive part of society that their resources must be a part of the solution.

The need for collective action is urgent. Understanding the purpose and struggles of business-led social-responsibility coalitions will help nonprofits collaborate with them more effectively. *Corporate Responsibility Coalitions* explores the impact and potential of such alliances. It assesses how these groups help raise awareness, embed “green” practices, and increase inclusive, responsible growth.

The authors profile 12 of the most strategic, effective, and long-standing business-led responsibility coalitions. These coalitions are a prominent part of promoting responsible business in the for-profit sector worldwide. They play a central role in encouraging ethical practices that are sensitive to the environment and the needs of lower-income workers.

Because business-led coalitions have greater influence with the for-profit sector than most nonprofit and government organizations do, we must pay close attention to them. Only by working together will we be able to forge widespread, lasting solutions.



Social Partnerships and Responsible Business

Edited by M. May Seitanidi & Andrew Crane. Routledge Publishing (routledge.com).


Partnering across the nonprofit, government, and business sectors has seen remarkable growth in the past 30 years. We’ve learned much about cross-sector partnering for social good during this time.

Social Partnerships and Responsible Business describes aspects of such partnerships, including:

- **the social issues** that have been addressed
- **factors that lead** to successful partnerships
- **traits needed by partners** if they’re to create the desired outcomes.

Cross-sector collaboration is increasingly the way to deal with today’s complex issues. Whether to partner is no longer the question; the question has become how to partner.

The contributors to this handbook explore management and governance challenges, including new forms of governance on a collaborative scale. They discuss putting theories into practice and letting go of the one-dimensional perspective of profit. All the contributors promote action toward social change through adaptations, adjustments, and new ways of doing business for partners in each sector.

Cross-sector partnerships can serve as bridges, connecting social issues and organizations from each sector. This book transforms how we think about social partnerships, which will help us improve our practices. It’s a dense yet important compilation that’s well worth reading for any nonprofit organization. 

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.



Employee Feedback Is No Longer Optional

The best way to create a productive, engaged workforce?
Take time to sit down and talk.

By Kate Zabriskie

Not so long ago, most people in the workplace received once-a-year feedback during a performance review. Employees didn't expect a development plan, a career track, or anyone to take an interest in their professional growth. Few people complained. It simply was what it was.

But times change, and norms evolve. The practice of once-a-year feedback is now an anachronism and as out of place as the fashions people wore when holding those annual reviews.

The reason workers now expect a steady diet of attention and conversation is debatable and perhaps worth scholarly inquiry. In the meantime, however, a demand for dialogue exists and must be answered.

Why Bother to Give Regular Feedback

For some, accepting the new reality means moving past the fact that they came along when life was hard. Sorry, it's time to get with the times, and get over it. Practices

have evolved. If you don't expect employees to accomplish their work with a typewriter and rotary-dial phone, then it shouldn't be hard to figure out that management practices have also improved.

First-class organizations have career paths, they invest in employee development, and their managers engage in regular dialogue with employees. If you want a top-notch worker, you must know what to do with one.

How to Maintain a Dialogue

Once you're committed to the notion that routine conversation is a must, the next step is knowing how to guide interactions. Here are the keys:

Take an interest.

Nothing builds engagement as well as a manager who seems to genuinely care for people, promotes their success, and has the ability to develop them. This isn't an annual affair. Rather, you've got to have a range of formal and informal

“Put feedback conversations on your calendar.”

conversations throughout the year. To get started, ask questions, and pay attention to the answers.

“What are you working on that’s exciting to you?”

“What aspects of your job do you enjoy the most?”

“If you could eliminate parts of your work, what would you stop doing?”

“What used to be interesting to you that’s now become mundane or boring?”

“If you could try something professionally with limited chance of failure, what risks would you take?”

“What first attracted you to this organization? Has anything changed about how you feel about your work here?”

“How do you feel about our interactions? Do I give your development the right amount of attention? Do you receive the right amount of feedback?”

There’s no limit to the questions you could ask. What’s important is to show a sincere interest in the answers, withhold judgment about what you’re told, and take action when you can.

Be observant.

As a manager, your job is to focus on the work that gets done and how it gets done. When you pay attention and are specific with your feedback, you show you’ve taken the time to notice what’s working and where opportunities exist. In other words, it’s important to communicate to people that they matter to you.

“Tim, I thought the graphics you used in that project were very strong. You chose the unexpected, stayed away from heavy text, and did something different from what we’re used to seeing. I think your approach answered the challenge Roger gave us to think outside the box.”

“Gina, I’d like to talk with you about the report submitted this morning. Specifically, I want to discuss the proofreading process you’re following. I noticed a few errors, and I want to see if there’s a way we can reduce the mistakes. If we could increase the accuracy of the reporting, I think we would improve our credibility. Is now a good time for you, or should I schedule something for this afternoon?”

Finding the Time for Planned Dialogue

There’s no clock fairy or magic solution to time management. Fitting feedback and development conversations into a regular workload is an effort that requires discipline. To ensure that productive dialogue happens, you need to put

it on a calendar, schedule it at regular intervals, sit down to listen, and put the smartphone away.

Consider the Payoff

Increased levels of informal feedback and scheduled conversation can seem overwhelming at first. But the more you do it, the easier it will be, the franker the discussions will become, and the greater the understanding will grow between you and your employees.

With whom should you be having conversations? Put those talks on your calendar today. 

Kate Zabriskie is the president of Business Training Works, Inc. (businesstrainingworks.com), a Maryland-based talent development firm. She and her team help organizations train their people to live up to what’s promised.



Carve Out Time for Conversation

In the rush of daily responsibilities, it’s easy to forget one of the simplest ways to motivate employees: Take a few minutes to talk – and listen – to them. Having a conversation with someone on your staff at least once a day should be at the top of your to-do list. Here are articles that can help (NonprofitWorld.org):

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

Never Enough Time (Vol. 26, No. 5)

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

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

Unleash the True Power of Conversation (Vol. 37, No. 2)

Avoid Headaches: Engage Your Employees (Vol. 27, No. 2)

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

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



Beware These Red Flags of a Toxic Hybrid Workplace

Remote-work experts share warning signs that an organization isn't prepared for hybrid work.

The “great work-from-home experiment” caused by the pandemic has led many organizations to go hybrid, with 83% of workers now viewing the hybrid workplace as optimal, according to a McKinsey report. To clarify, a hybrid workplace combines aspects of both in-person and remote workplaces.

Although it's becoming the norm, many organizations aren't prepared for this transition. While nine out of 10 organizations plan to move to some form of a hybrid model, 68% don't have a detailed plan in place nor have they communicated yet on what it will look like, the McKinsey report reveals.

Hybrid workplaces can be toxic on a number of levels if they're not carefully managed. Below are some glaring red flags that a hybrid workplace will be toxic:

There's no real plan for creating a functioning workforce. Winging it isn't an option when it comes to designing a high-functioning and fair hybrid workforce. The organization must be committed to creating a clear set of actions to integrate remote and hybrid teams, build a hybrid work culture, and treat hybrid and in-office workers inclusively.

There are no senior leaders who work remotely. An organization that truly values remote work will have people

at all levels – including at the senior leadership level – who work remotely. If only lower or mid-level employees work remotely and all senior leaders work in the office, it's unlikely that this will be a healthy, equitable place to work.

Digital communication tools haven't been prioritized. In a hybrid or remote work environment, people can't just pop into someone's office to check on things or have impromptu conversations. This, of course, can put remote workers at a disadvantage. However, there are plenty of communication and collaboration tools to address the gaps that can occur when some people aren't physically present. If digital tools haven't been set in place or people haven't been advised on how to optimize them, employees aren't being equipped for success.

Celebration, praise, and rewards happen only in the office. A big part of a good organizational culture is having celebration, praise, and reward activities to show appreciation for employees and make them feel valued. A warning sign is if these things take place only in the office and there aren't strategic efforts to make people working remotely feel included as well.

With technology tools and platforms such as Slack and Zoom it's easy to share praise and encouragement for the whole organization to see. There are many easy events and activities that can be done virtually as well. Organizations

that take the time to do these are showing their commitment to the remote work environment.

There's no solid communication plan for remote team members. Hybrid teams need to pay particular attention to communication, making sure to include remote employees in any meetings or activities being held at the office. Morale will plummet if people feel left out of the loop.

Information isn't accessible. If information isn't shared on some sort of digital platform for everyone to access, remote employees can miss something that's vital to their work. An organization that's doing hybrid work well shares information rather than hoarding it. Such sharing could take place through an internal e-mail newsletter, an intranet, a shared drive, or some other digital platform.

Remote workers aren't given the appropriate equipment. With a hybrid model, organizations can no longer think only about what equipment and technology are physically present in the office. They need to provide remote employees the same tools and resources as they do for in-person staff. This could be through a home-office stipend, loaned equipment that can be taken home, or accommodations for employees to work at co-working spaces. A successful hybrid organization will ensure that employees everywhere have access to the tools they need to do their jobs successfully.

It's important to note that a toxic workplace may not have all these red flags. Some may have only a few. Likewise, if your organization has one of these warning signs, that's not necessarily proof of a toxic workplace but could instead show

Making Adjustments

For more on adjusting to the new workplace, see these articles at NonprofitWorld.org:

How Can You Keep Your Remote Workers Productive? (Vol. 38, No. 3)

Don't Let This Crisis Go to Waste (Vol. 39, No. 1)


Work Going Hybrid? What You Need to Know (Vol. 39, No. 1)

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

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

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

Life after the Pivot: Storytelling to Refresh Your Nonprofit Outreach (Vol. 39, No. 2)

that the transition to hybrid is still bumpy and that you need to put more energy into detailing – and communicating – a functional plan. 

This article was prepared by FlexJobs (flexjobs.com), an online job service for professionals seeking flexible work, specializing in full-time and part-time remote jobs, employee and freelance jobs, and on-site jobs with flexible, part-time, and alternative schedules. For more information, contact Kathy Gardner at kgardner@flexjobs.com.

Enjoy Reading NONPROFIT WORLD ?

Here are more benefits of membership in the Society for Nonprofits

- 12 issues of **Nonprofit World Funding Alert**, providing monthly updates on grant and funding opportunities
- **Membership in GrantStation**, with instant access to over 5,500 grantmakers via the Find-a-Funder searchable database
- **Complete access to over 1,200 printer-ready management articles**, searchable by author, key word, or subject
- **Reduced enrollment fees** from the Learning Institute for the Society's **Certificate of Excellence in Nonprofit Leadership and Management**
- **Free job postings** on our NonprofitCareers.org job site

For more information, visit: NonprofitWorld.org



Are You Sure You're Training the Right Things?

Don't waste resources on training that nobody wants or needs.

By Dan Black

It's common for people to dread training and avoid it if they can. It's not that they don't want to learn. The problem is that the training is often for skills they'll never use and in which they have no interest.

There's a proven technique to solve this problem. You need to find out what people's jobs really entail and what training they actually need. To do so, it's effective to use a modified version of DACUM (which stands for Developing a Curriculum). It was created by educators to design courses by first analyzing people's needs. Here are the steps:

1. Get Real Information from the Right People

First, you need to glean information about the role at hand. You'll use this information to design training for the person in that role. The best way to gain this knowledge is to convene a group of people who are familiar with the role. Diversity of perspective is key here, so seek a mix of people. Here's a sample group:

The new person. To gain fresh perspectives, include those who've been in their jobs for less than a year.

The person who has been there forever. Such people can provide historical knowledge about how the role has changed over the years.

An adjacent collaborator. Don't be afraid to bring in someone who isn't in the role but is "close" to it. This individual can provide an outsider's perspective and at the same time bring knowledge and experience to the role at hand.

Key stakeholders. This group is essential because they need the results. They're your champions who need to understand the process and who often support your budget.

“Use a technique created by educators to design courses.”

2. Create an Occupational Definition

Get everyone in the room focused on the role. Document the following:

Reporting lines. Who does the person in this role report to – up, down, and laterally?

Critical knowledge. What specific skills are essential to doing the job well?

“Nice to have” abilities and traits. What type of person tends to perform well?

Information that was learned but wasn't taught. What were those “aha moments” people had on the job?

3. Define the Body of Knowledge for Peak Performance

Use a duty/task matrix to define the body of knowledge necessary to perform in the role. All you need are some sharpies and big post-it notes. Put the information on the wall so everyone can see it. Put duties down the left of the matrix and tasks going across left to right. Here are the definitions and some examples:

Duties are top-of-mind for the role. They don't have a beginning or an end. They're ever-present while on the job. Their descriptions usually end in -ing. Some examples:

- **Development director:** Gaining support for the organization
- **Volunteer coordinator:** Matching volunteers with the right jobs.


Tasks are processes or procedures that have a beginning and end. They usually can have a metric associated with them. People fulfill duties by repeatedly completing a series of tasks, usually four or more. The description of a defined task requires an object, verb, and qualifier (adverb or adjective). For example:

- **Development director:** Use social media daily to connect with supporters.
- **Volunteer Coordinator:** Arrange an annual dinner to thank volunteers for their work.

When you identify the duties and the required tasks, you've documented the entire body of knowledge needed for the role at hand.



“What were those
“aha moments” people
had on the job?”

Now you're armed with an analysis and potential for results based on empirical data and not simply feelings. You can develop a plan that justifies a budget and will deliver results. Oh, and you've done it all in two days. 

Dan Black (danblack@tortal.net) is the chief learning strategist at Tortal Training. He specializes in GSD – “getting stuff done” – and is recognized in the industry as a “pleasantly disruptive force” that challenges conventional thinking on training and talent development.

4. Understand the Gaps

Go through your matrix task by task, and draft a gap analysis. Ask: Where is it documented how to perform this task? Or has it been passed down over time rather than written down? If it's the latter, it's a gap.

5. Consider Criticality

Everything in your duty/task matrix is important. But what's most critical? Again, go task by task, and describe what the impact would be if that task weren't accomplished.

Ask: If the worker fails to perform this task, what happens? Does anyone notice? Does it create some rework – possibly a lot? Will you lose a customer? Will someone get hurt?

6. Build Your Plan

You now have all the information you need to build your learning plan. You know what gaps need to be filled and what information is critical to performance. You can now design training that will truly impact performance. You can map these duties and tasks to competencies, leverage them in cross-team training interactions, and make decisions on the right method for delivery.

Create Your Learning Plan

Find out more with these articles at [NonprofitWorld.org](https://www.nonprofitworld.org):

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

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

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

Let's Take the Mystery Out of Training Millennials (Vol. 36, No. 1)

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

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

Are Your Training Goals in Alignment? Four Keys (Vol. 39, No. 2)

Build a Winning Workplace Culture

Be the M.O.R.T.A.R. that holds it all together.

By Magi Graziano

The number-one driver of people's engagement and performance is culture. When your workplace culture is working, you can leverage it as a competitive advantage. However, when your culture isn't functioning properly — or not working at all — it's a deterrent to productivity, innovation, and employee morale.

If the culture you construct at work is one of the most pivotal cogs driving success, why do so many organizations fail at building one that wins? It's because, frankly, many nonprofit leaders are unaware of how big an impact culture really makes.

“The number-one driver of people's performance is culture.”

What Are the Keys?

So how do you build a successful culture? It begins with you, as a leader: You must become the M.O.R.T.A.R. that holds it all together. M.O.R.T.A.R. stands for:

MOTIVATE

There are three keys to motivating workers to operate in service of the organization:

Clearly envision the overall mission.

Communicate the mission, vision, and purpose in a way that moves, touches, and inspires followers.

Link people to the purpose of their roles and to the larger role of the organization.

When you do these three things, people accomplish great feats, and enjoy themselves while they're doing it. Their energy won't flag even when things get tough, because they realize that what's at stake is much more than the task at hand.



ONBOARD

When new people come on board, it's crucial to connect them to the organization's vision. They must understand:

- **why** the organization exists
- **the core operating values** that employees are expected to demonstrate in the day to day implementation of their roles.

When new hires begin with the end in the mind, connecting their roles to the mission, they're set up for success. That's why onboarding deserves your keen attention.

REIN IN NEGATIVITY

Every organization deals with setbacks, challenges, breakdowns, and disappointments. The difference between success and failure is the leader who checks in with how people are feeling and works to reverse the negativity.

All negativity stems from an unfulfilled expectation, a thwarted intention, or an undelivered communication. When managers are aware of their employees' feelings, they know when someone is off kilter or upset. The astute leader provides support for people to overcome these motivation killers.

Inspiring people is a core competency of leaders. Great leaders foster alignment and engagement by inspiring people to bring their best selves to work. Leading others requires you to bring this energy. People become inspired when they start believing they have more ability than they thought they did.

TRAIN

Every person, at every level in an organization, needs some level of training and development. The rate of innovation is accelerating at a mind-numbing pace, and no matter what role a person holds, the skills of today will become insufficient for the work of tomorrow. Whether it's in the area of people readiness, a deeper technical expertise, management training, or an ability to take feedback as constructive guidance – the development of the workforce is a core tenet to any winning workforce strategy. The greatest gift you can give your people is the gift of developing them professionally.

ALIGN

Great leaders align people's values to those of the organization. To create such alignment, you must introduce the bigger picture into every employee's heart and head. When you understand how your mission satisfies people's needs, you have direct access to igniting engagement within them.

Without followers, you can't be a leader: Followers will voluntarily engage in something only if it satisfies their needs first and your goals second. When people can connect their personal mission and purpose with the greater good of

“An effective reward can be as simple as a heartfelt “Great job!””


the organization, they naturally feel compelled to do better and give more of themselves at work.

REWARD

The best leaders celebrate the success of every person and team. They understand the importance of incentives in keeping people engaged. And they realize that an effective reward can be as simple as a heartfelt “Great job!”

At the same time, they hold people accountable. Great leaders inform people what they're expected to accomplish and how their roles connect to the bigger plan. Seeing the full impact of their work is a reward in itself.

Look at Yourself First

To create a culture that drives your initiatives forward and fulfills your mission, you'll need to invest time and energy towards developing yourself as a leader of that culture. How well you communicate your intentions, and how often, is critical to the success of your cultural alignment. To be the M.O.R.T.A.R. that holds your workforce together, you must make developing yourself a top priority. 

Magi Graziano (KeenAlignment.com) is an employee recruitment and engagement expert and author of The Wealth of Talent. With more than 20 years' experience as a top producer in the recruitment industry, she helps leaders bring transformational thinking to their day-to-day operations.

Become a Leader of Culture

For more on shaping the culture around you, check out these articles at NonprofitWorld.org:

How to Use Your Organizational Culture as a Competitive Tool (Vol. 20, No. 2)

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

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

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

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

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

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

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



Are You Breeding the Conditions for Fraud to Occur?

Fraud in nonprofits is alarmingly frequent. Avoid it by shaping a fraud-prevention environment.

By Steven M. Braunstein

After an employee commits workplace fraud, leaders often scratch their heads, wondering why such a stand-up individual would perpetrate such a breach. The truth is that even the most loyal employee – and even a usually honest person – can commit acts that seem unthinkable – if conditions are right.

Why Fraud Happens – & Why It's Predictable

In a recent case, the treasurer of a nonprofit – a dedicated volunteer and a grandmother – handled all financial and administrative tasks for more than 10 years, receiving praise from the organization and community. It wasn't until a vendor complained about an unpaid bill that the nonprofit's secretary found a number of inappropriate checks written out of the organization's checkbook. The treasurer had been making cash withdrawals and spending the money on clothing, airfare, and cable bills. The organization lost more than \$250,000.

“It's important to speak directly to previous employers.”

Situations like these are shocking but often predictable. Most fraud happens when three circumstances occur:

- an opportunity
- an incentive
- a rationalization.

If an employee comes across a window of opportunity for fraud during a personal crisis, it will be easier to rationalize the unethical act.

For example, let's say nonprofit employee John has identified a weakness in the system that would allow him to take small amounts of cash unnoticed (**the opportunity**).

John ignores this weakness for several months, but then his wife loses her job and the family becomes financially vulnerable (**the incentive**).

John convinces himself that he's underpaid and that the small amounts of money he'll take won't affect the nonprofit (**rationalization**). Once the rationalization is in place, John is likely to take advantage of the weakness in the system.

Who Can Prevent Fraud?

The best fraud deterrent is a system of controls and procedures that prevent it from occurring in the first place. Three groups contribute to this first line of defense:

“Even the most trusted employee will commit fraud in certain conditions.”

The human resources department should perform criminal and civil background checks, as well as checking references. Since white-collar crime rarely results in charges filed, a history of fraud may not be apparent in a criminal background report. It's important, then, for HR staff to verify former employment and speak directly to previous employers.

The IT security team should create monitoring systems and policies about:

- personal-device usage (mobile phones, laptops, and tablets)
- restricted-access areas
- information sharing.

Front line managers must ensure that the policies are actually being practiced day-to-day. They also need to maintain the proper segregation of financial responsibilities among employees. It may be tempting, after someone has worked at your organization for a long time, to relax these controls. That's exactly where the trouble usually starts.

The Key Ingredient: People's Perceptions

Once the proper systems and policies are in place, nonprofit leaders must take the extra step of *managing the perception* of internal controls. If employees don't understand why such controls are in place, the organizational culture can suffer – creating a perceived “big brother” environment, damaging employee morale, and dampening the entrepreneurial spirit that sustains a nonprofit. The following best practices will help strike a balance between maintaining internal control and fostering a welcoming environment.

1. Make fraud prevention policies transparent. Provide information to all new hires about the function of internal controls. Update employees whenever policies are augmented or changed. Each employee should be able to answer the following questions:

- *What is the goal* of the fraud-prevention program?
- *What specific data* do monitoring systems collect?
- *Why are financial responsibilities segregated* in specific ways?
- *Why is preventing fraud a priority* for our nonprofit?

Be up front about the purpose of internal controls, explaining that fraud can quickly throw an organization off course and lead to massive, long-term setbacks.

2. Set the tone at the top. Employees will look to you for cues as they form their perception of your organization's culture. You must:

The Right Culture, the Right People, the Right Controls

To create a workplace most likely to deter fraud, see articles such as these at NonprofitWorld.org:

Setting Up a Control System for Your Organization (Vol. 16, No. 3)

Use Background Checks to Avoid Legal Pitfalls (Vol. 29, No. 1)

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

Can Your Organization Afford to Lose \$100,000? Safeguards Every Nonprofit Needs to Implement (Vol. 30, No. 3)

Protect Your Resources from Insider Theft (Vol. 20, No. 4)


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

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

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

- **Be consistent** in your messages about internal controls.
- **Demonstrate your own compliance** publically and often. For example, if your organization requires employees to wear badges for access to secure areas, you should visibly display your badge as well.
- **Explain to employees** why accuracy is so important and how high-level functions ensure appropriate oversight.

3. Create a channel for questions and concerns. It's estimated that 40% of fraud is discovered because of an employee tip. But to get those tips, you need the proper channel for questions and concerns. Without such an outlet, employees will head straight to the rumor mill. Establishing pathways for expression – a secure forum, an online equivalent to a suggestion box, or even an anonymous e-mail function – will help employees feel like they're a critical component of the solution, not the target of the system.

4. Foster a healthy culture that leads to high morale. Disgruntled employees – those who feel undervalued, ignored, or overworked – are more likely to commit fraud. Offering plenty of vacation (and making vacation days mandatory), flexible sick leave, and accommodations for personal matters will help employees be on their A-game while also protecting your nonprofit from fraud. 

A veteran of Snyder Cohn Accounting (SnyderCohn.com), Steve Braunstein, CPA, was named president in 2010. In addition to his extensive client work, Steve manages and leads the firm's day-to-day operations.



Overcome Unconscious Bias in the Hiring Process

Increase diversity and productivity with these recruiting tips.

By Molly Brennan

Most nonprofits understand the importance of diversity. They know that diverse teams are more creative, build better relationships with stakeholders, develop stronger solutions, and achieve better outcomes in every performance measure.

But there's one aspect of diversity that many nonprofits aren't focused on: unconscious bias in the recruiting process. To maximize inclusion, you must be aware of – and work to avoid – your internal biases. It's important to disrupt unconscious bias in the following ways.

Educate your recruiting team. Make sure your interviewers know what bias is and how it can impact the hiring process. Offer articles and trainings to help mitigate against unconscious bias. As part of this education and training, explain the most common biases and how they may impact hiring decisions.

For instance, understand the “halo and horn effect.” It's common to associate certain factors (such as graduating from a prestigious university) with particular traits (this candidate must be extraordinarily intelligent). If you (or someone else on your hiring committee) “prefer” someone who went to a certain school or is from your hometown, it can create a “halo effect” where that one detail impacts your opinion of the candidate. In reality, a degree from a top school – or a parallel experience with a member of the hiring team – doesn't necessarily mean someone is an ideal candidate.

Conversely, one negative association (even something as minor as supporting a rival sports team) can create a “horn effect” that results in a negative perception of someone because of a single trait or factor. These effects are

particularly insidious because we're often not aware that they're shaping our perceptions and, ultimately, decisions.

During the hiring process, we're inclined to favor candidates “like us,” with shared interests, backgrounds, or beliefs. This tendency to prefer people like ourselves is known as “affinity bias.” We may not feel a connection to someone from a very different background and may thus see them less favorably as a candidate.

But if we hire only people “like us,” we'll create a homogeneous workforce. Building a workforce with a variety of backgrounds, experiences, beliefs, and perspectives is critical to your organization's success.

In some organizations, new hires are determined by committee. In these cases, beware of “bandwagon bias,” where people believe something just because the group holds that belief.

Change your structure and processes. One of the most important initiatives you can take is to implement structured, consistent processes. As part of this effort, develop core competencies that your ideal candidate will possess – and do so *before* beginning a search. What skills and characteristics should candidates offer? What type of experience will be crucial to their ability to do the job well? Compare all prospects against this same list.

Consistency is key. Ask each candidate the same interview questions to ensure your assessments are impartial and unbiased. Have the same person (or people) interview all candidates so prospects can be fairly assessed. Interviewers should use the same pre-determined criteria and structured process for each candidate.

Another technique that has been valuable in reducing bias and increasing hiring diversity is using “blind” resumes

and work samples. Redacting certain information on a resume or CV (such as name, address, education, and other personal details about candidates) evens the playing field and keeps you focused only on the candidates' experience and qualifications.

Create assignments that provide tangible insights into how each candidate would do in the actual work of the job. Develop sample scenarios based on real-world situations that your teams face, and ask candidates for their assessments: How would they solve a relevant problem? What would they do in a certain scenario?


Give all candidates the same test, and evaluate them all on the same criteria. And, ideally, make it a "blind" test with identifying information removed so candidates can be judged solely on their answers and not on their gender, age, or other factors.

Improve your job descriptions. Job descriptions can tie into bias. Certain requirements (such as an advanced degree or years of experience) can attract a homogenous group. Some candidates might have significant education or a robust amount of work experience; others may have spent years traveling, volunteering, or parenting. Don't assume that one "path" is preferable to another.

Diverse experiences, backgrounds, and choices are valuable in a workforce, so don't discount candidates that didn't travel a "traditional" path. Their life experiences and unique perspectives can be tremendously valuable within the workplace.

Also, be mindful of the words you use in your job descriptions. Words like "assertive," and "competitive" can be off-putting to some prospects. Use neutral language to entice a more diverse candidate pool. Eliminate gender-specific pronouns: It's becoming common to use "they" as a pronoun (rather than "he" or "she") in job descriptions to avoid gender bias and signal a commitment to diversity.

Expand your network. To maximize diversity, look farther afield. Don't rely solely on the recruiting methods you've always used or you'll wind up recruiting a homogenous group of candidates. For instance, employee referrals are often ineffective in increasing diversity efforts. Employees tend to refer people similar to themselves in terms of race, education, and background.

To recruit a more diverse pool of candidates – and build a more diverse workforce – go beyond the "usual" referral sources. Task your recruiting team to reach out to a wide range of organizations and sources to expand candidate pipelines. 

Molly Brennan is founding partner of Koya Leadership Partners (koyapartners.com). She is the author of The Governance Gap: Examining Diversity and Equity on Nonprofit Boards of Directors.

Avoid These Biases when Hiring

The best way to combat unconscious bias is to recognize it and then use hiring practices that promote equity, consistency, and fairness. Before you start the hiring process, learn about these biases in yourself and others on the search committee:

Affinity Bias: You favor someone you see as similar to yourself.

Bandwagon Effect: You choose one candidate simply because everyone around you favors that person.

Confirmation Bias: Once you've decided you like someone as a candidate, you search for information that will confirm your first impressions.

Halo Effect: You're impressed by one thing in the candidate's background, so you see that person as positive in other areas as well.

Horn Effect: You see something about the candidate as negative, so you rule against the person as a whole.



Your Greatest Asset: A Diverse Workforce

For more perspectives and insights on nonbiased hiring, see these articles at [NonprofitWorld.org](https://www.nonprofitworld.org):

Take the Gamble Out of Hiring with Assessments (Vol. 25, No. 4)

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

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

Is Your Organization Culturally Competent? (Vol. 26, No. 6)

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

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

Hiring a Concern? Learn What Talent Magnets Do (Vol. 24, No. 5)

Don't Fall Behind When It Comes to Recruiting (Vol. 39, No. 1)

Hire the Best But Hire with Care (Vol. 20, No. 6)

Fostering Organizational Resilience

Build resilience into all corners of your organization and you'll be able to weather any storm.

By Emily Stumhofer & Erin Gloeckner

Resilience is often defined as the ability to recover after a setback. For nonprofits, resilience is essential not only in troubled times but in everyday mission-advancing work. Fostering resiliency will prepare you for crises and enable your team to take on higher-risk, higher-reward ventures.

The Many Faces of Resiliency

Here are the most important facets of resiliency:

Redundancy, or having more than one contingency plan in place, is a key component of resilience. Though the term redundancy often evokes negative sentiments, in risk-management practice, redundancy is essential.

Increasing redundancy at your nonprofit might be as simple as implementing an organization-wide emergency notification system. It might mean training a second person as back-up for important operations such as accessing vendor records and contact information. It might also invite

complexity, such as having a secondary system in place for notifying staff and participants that a facility is in lock-down if your primary contact system isn't working.

Hiring workers with resilient characteristics is another way that nonprofit teams enhance resiliency. Resilient attributes include:

- humility
- patience
- the ability to focus on the present
- a drive to support coworkers and others.

A key trait among nonprofit leaders who encourage resilience is a focus on the empowerment and support of others. A rare but effective resiliency trait is the desire to make oneself – as a team leader or team member – obsolete to the point that other team members are empowered to take on your role if a crisis or personnel transition demands it. The journey towards organizational resilience can conflict



with individual egos and often requires selfless service by nonprofit team members.

While hiring people with resilient traits is important, developing these characteristics among existing staff and volunteers is also vital. It's also essential to emphasize cross-training and create succession plans to manage transitions when organization leaders depart for any reason.

Business continuity planning (BCP) is sometimes implemented in concert with crisis planning, though BCP is typically broader in nature and prepares a team to respond to a variety of challenging events. For example, a nonprofit team might need to implement a business continuity plan when the office sprinkler system malfunctions and floods the facility, damaging equipment and files. Though the event might not be deemed a "crisis," it warrants enacting contingency plans, perhaps for telework or off-site work as well as to repair the organization's space, equipment, and data.

Tips for Enhancing Resiliency

Consider drivers of resilience that are unique to your nonprofit. Many things you can do are common in organizations of all kinds; however, some resiliency enhancements will be specific to your nonprofit's mission, the context in which you operate, the audiences you serve, and how your programs are run. Assess your organization's special traits to help you identify vulnerabilities. For example, a large nonprofit may need to create a different crisis plan for each of its programs rather than using one generic plan. Treating all programs the same could be positioning the organization for disaster.

Foster a culture of candor, trust, and mutual support. Culture is often considered to come from the top of an organization, stemming from the actions of the board, executive, and senior management team. In reality, culture is affected by all team members in an organization and can shift gradually as team members come and go. Essential to building a resilient culture – one that can bounce back in the wake of a crisis or other challenging event – is fostering a sense of mutual support and trust throughout your organization. Build up each member of your team. Encourage individuals to speak up when they need help, when they have ideas, and when they have concerns about risks, organizational dysfunction, misconduct, or any other challenges your team might face. A culture that stimulates supportive relationships and open communication will serve as a springboard in a time of crisis.

Use crisis events to cultivate real change. When a crisis occurs, as it inevitably will, learn from it with actions such as these:

- **Reflect** on the oversights that might have exacerbated the crisis.
- **Devise** a timeline for post-crisis review and adaptation.

Bouncing Back

One key aspect of building a resilient organization is to enhance resiliency in yourself. Research finds that resilient people aren't just capable of bouncing back in spite of adversity. They're stronger *because* of adversity and how they face it. In his insightful book *Positively Resilient* (redwheelweiser.com), Doug Hensch shares the secrets of resilience, including these tactics:

Instead of focusing on how tough your difficulties are, reframe each experience into a challenge or game to test your abilities.

Don't try to make a perfect decision. Make a "good" decision to help you move forward.

Cultivate mindfulness. Download an app that will guide you through a short meditation.

Welcome feedback and act on it so that you can keep growing and improving.

Break complex goals into sub-goals to build confidence and keep from being overwhelmed.


Pay attention to how you speak to yourself about feelings. Instead of, "I am angry," for example, try, "I'm experiencing thoughts of anger." This small shift turns your thinking from something permanent and personal to something temporary and objectified.

Avoid the words "should," "need to," "have to," "must," "always," and "never." They limit the ability to think of other options for action.

Take the strengths assessment at VIAcharacter.org. Work your top strengths into your life in new behaviors and thought patterns.

- **Engage** in dialogue with peer organizations.
- **Conduct** after-action reviews with internal teams.
- **Decide** what should change as a result of the crisis. If it was an act of child abuse after an unauthorized person gained access to a facility, how will you ensure that this cannot happen in the future, and what will you do if it does? How will you implement safeguards that address your stakeholders' concerns?
- **Dedicate** ample time to conversations about what went wrong – and why.
- **Discuss** how you'll balance safety concerns in the future with the need to take some risks to advance your mission.
- **Seek** input from people across the organization to shed light on areas that need improvement. Often, a crisis will arise in an area that's not as robust as it could be. The crisis may be the catalyst you need to evolve in a new direction.

CONTINUED ON PAGE 28

- **Renew** partnerships with key constituents, including other organizations and volunteer teams. Don't neglect your relationships at a time when they might be crucial for your future.
- **Review** your strategic plan. A crisis can affect your organization's work for the short term or even in the big picture. Reevaluate the relevance of your goals and strategies to ensure that your direction remains aligned with your stakeholders' needs.
- **Admit** mistakes, and take responsibility. After a crisis, stakeholders and the general public expect nonprofit leaders to apologize, listen, implement improvements, and vow to do better next time. Use the opportunity to present a cohesive front to the public, share your commitment to learning from mistakes, and describe your plans for improvement.
- **Consider** how enhanced systems, processes, and commitments to collective learning can enhance your recovery from future crises. Take the time to build resiliency into your culture and planning processes, and reap the benefits in the future, when you need them most. 

Emily Stumhofer is a former staff attorney at the Nonprofit Risk Management Center (nonprofitrisk.org). Erin Gloeckner (erin@nonprofitrisk.org) is the director of consulting services at the Nonprofit Risk Management Center. This article is reprinted with permission from the Nonprofit Risk Management Center and originally appeared in Risk Management Essentials.

“Resilient people are stronger *because of* adversity.”

Boost Resilience in Yourself & Your Team

For more ways to augment the power of resilience, take a look at these articles (NonprofitWorld.org):

- Making Better Mistakes** (Vol. 38, No. 4)
- Boost Your Organization's Resilience** (Vol. 38, No. 3)
- Don't Go it Alone in a Crisis** (Vol. 37, No. 2)
- Planning to Succeed: Creating a Succession Plan** (Vol. 29, No. 3)
- Foreseeable Harm** (Vol. 20, No. 3)
- Leading from Feeling: Coaching Tools for Interpersonal & Organizational Excellence** (Vol. 27, No. 1)
- Embrace Mindfulness as a Leadership Practice** (Vol. 36, No. 2)
- Six Steps to Good-Reputation Insurance** (Vol. 15, No. 1)
- Why Feedback Is the Key to Your Success** (Vol. 35, No. 3)
- Planning for the Unforeseeable: How Smart Risk Management Provides Peace of Mind** (Vol. 24, No. 2)
- Build a Powerful Staff Team** (Vol. 18, No. 4)
- Be a Better Leader by Being a Careful Listener** (Vol. 37, No. 1)

Coming Up in Nonprofit World



- The Leadership Skill No One Talks About
- Use the Magic of Data to Raise Funds
- Practices to Help You Thrive in Challenging Times
- Don't Overlook Gen-X Donors
- "Help! My Board Won't Help Raise Revenue"
- Secrets to Finding & Keeping Top-Notch Talent Without Breaking the Bank
- What to Do When an Employee Becomes a Cybercriminal
- Are You Tapping in to the Power of Mentoring?
- About That Bonus
- Top 10 Things to Understand about How Fundraising Really Works Today

Plus much more!



Increase Donations with Google Ad Grants

You can't go wrong if you follow these steps.

By Armina Fareed

In addition to providing revenue for you, Google Ad Grants can help you build awareness, share information, and gain supporters. Google has helped 35,000 nonprofits with Google Ads. If you're a qualifying nonprofit, you'll receive \$10,000 (up to \$40,000 for Grantspro participants) in in-kind Google Ads advertising every month.

Many nonprofits have had great success using Google Ad Grants:

Days for Girls (daysforgirls.org) raised \$5,000 in 60 days with more than 400 conversions. The average donation value was \$212.

Asante Africa Foundation (asanteafrica.org) received 1.27K impressions in 30 days with an average CTR (click-through rate) of 12.75%, resulting in 25 new visitors signing up for the newsletter.

We Care Animal Rescue (wecareanimalrescue.org) saw a 350% increase in online activity, a 125% increase in online applications, and an 3.51 average CTR.

Google Ad Grants (google.com/grants) work just like Google Ads online advertising, by showing your ad on the Google

search engine to people searching for nonprofits like yours. Your ads will appear on Google search results pages, below the ads of paying advertisers.

Here are the steps to follow to get a Google Ad Grant:

Go through the Pre-Qualification Process.

Check the eligibility requirements to be sure you're eligible for a grant.

Sign up for Google Ads and create an account.

Enter basic information including currency, billing, and time zone. *Do not* submit any payment information. Skip this section and ignore any messages to set up the payment method. But choose USD as your currency regardless of your country.

Submit the 10-minute pre-qualification survey.

Watch the five-minute training video and take the short quiz after the training. Your Ad Grants accounts won't

CONTINUED ON PAGE 30

be activated unless the Ad Grants training and quiz are completed.

Submit your account for pre-qualification review. You'll receive an e-mail with further instructions within five business days. Don't proceed to the next step until you receive this e-mail.

Set Up Conversion Tracking.

After you're prequalified, you need to set up conversion tracking. Google Ad Grants requires active and accurate conversion tracking. You need to track at least one conversion per month. Here are ways to do so:

Track monetary conversions like donations and ticket sales to fundraising initiative signups.

Track any meaningful action people take on your site. Once the action is completed, the user should reach a confirmation or thank-you page. Track this page using web-page tracking. If you don't have a confirmation page, track the click of the action button.

Track engagement with your website content. Use Google Analytics or a third-party tracking program to track website engagement signals.

Track hotline or support-line phone calls. Track when someone calls you from a phone number in your ads or from a phone number on your website, or when they click your phone number on your mobile website.

Track when a customer installs your app or completes an in-app action, such as a donation or signup, after clicking on your ad.

“You'll receive \$10,000 in advertising every month.”

Here are some tips that Google recommends for conversion tracking:

Use Google Tag Manager (GTM) to add or edit tracking codes.

Link Google Analytics to Google Tag Manager.

Track multiple conversions, but monitor your conversion rate. Just set up a different conversion action for each distinctive goal you want to track. For example, you can set up one conversion action to track donations on your website and another to track calls from your ads.

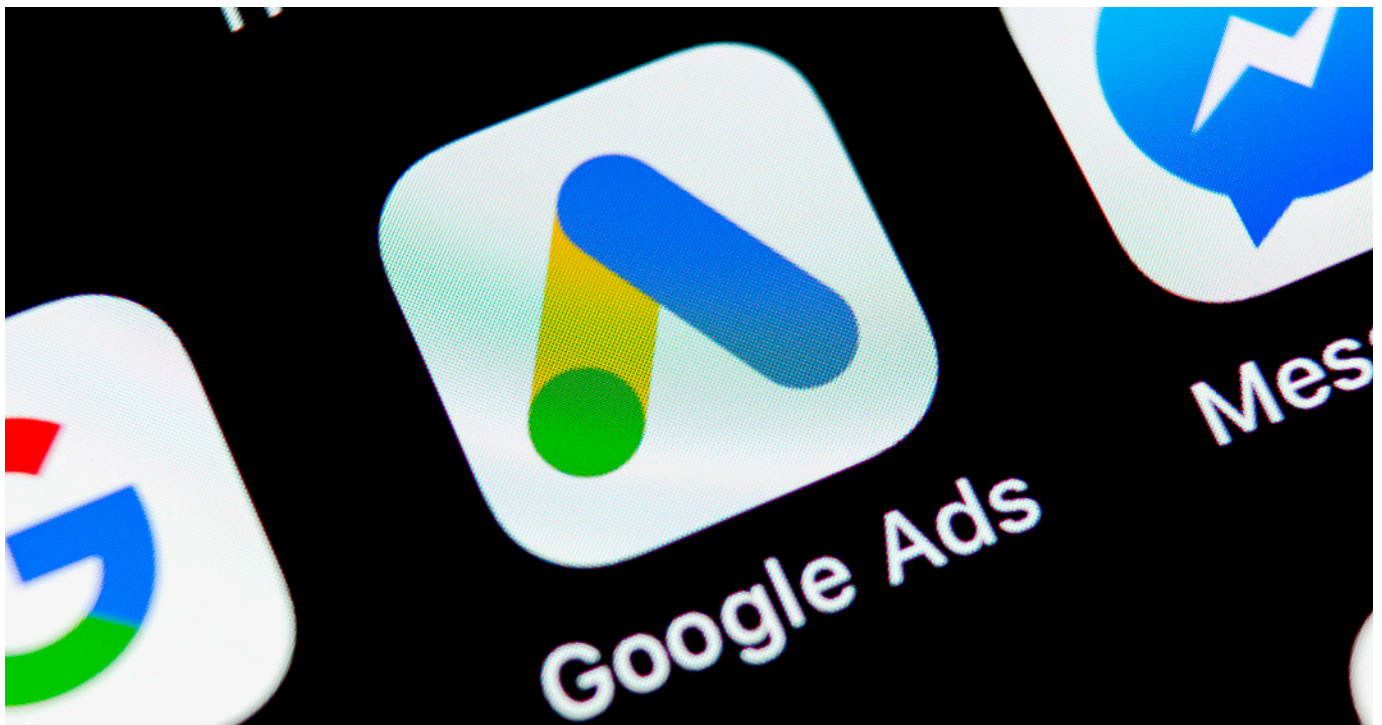
Swap control for easier management with Smart Campaigns. Read more about Smart Campaigns at: <https://support.google.com/google-ads/answer/7457632?hl=en>.

Set Up Your Campaigns. Yay!

Now you're all set to run campaigns on Google Ad Grants and receive \$10,000 of in-kind advertising a month. (All Google Ad Grants accounts are limited to a monthly budget of USD10,000, which equates to a daily budget of \$329.) Use these steps to create your campaigns:

Click + and enter your campaign type and name. Select the result you want to get from this campaign (website visits, phone calls, or app downloads).

Under “Networks,” deselect the checkboxes for “Include Google Search Partners” and “Include Google Display Network.” Google Ad Grants can only run on Google Search.



Choose your bid strategy, and set your daily budget and delivery method. Each campaign must use one of these: Maximize conversions, Maximize conversion values, Target CPA, or Target ROAS bidding. (Remember: The daily maximum budget of all the campaigns combined is \$329.)

Set up sitelinks and ad extensions. Enter at least two unique text sitelinks. Set up callout extensions. (Callout extensions are 25-character snippets of texts. They highlight unique aspects of your organization or services.) Enter a call extension. (The call extension is your phone number.) You can get up to 15% higher CTR by setting up sitelinks and ad extensions, so don't skip this step.

Save and Continue. You're not done yet!

Set Up Ad Groups & Keywords.

You must have two Ad Groups. Each ad group must have two ads. Follow these steps:

Select the Ad Group type (standard or dynamic). Ad Groups target a shared set of keywords.

Enter the keywords. You can't use generic keywords or single keywords that are closely related. For better conversion, try using long-tail keywords – words or phrases that are longer (usually three or more words) and more specific than the usual short keywords.

Create another Ad Group in the same way. Each Ad Group will show a unique ad relevant to your keywords.

Create Your Ads.

It's time to create your ad copy. This is the message you want to show people who search for keywords related to your message.

Final URL is your nonprofit website address. This is your landing page. It can only accept the domain name registered in your Google Ad Grants account.

For Headlines 1, 2, & 3, consider including words that people may have entered in their Google search (the keywords). Highlight features that make your organization stand out.

Display path is the URL path that searchers see on Google search results. It's usually shown in green on the ad. Path 1 and path 2 fields are designed to help people who see your ad get a better sense of where they'll be taken when they click it. Your path text doesn't need to match the final URL.

Fill out the Description Field. Highlight details about your product or service. Include your Call to Action here.

Stay under the length limits for the ad copy to convert better. You can provide more information by adding extensions to the ad copy.

Click Done. Save and Continue.

Don't forget to create one more ad, repeating the above steps. Remember the rule: At least two ads per Ad Group.

More Ways to Gain Supporters Online (NonprofitWorld.org)

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

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

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

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

Planning for Digital Longevity (Vol. 34, No. 1)

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

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



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

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

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

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

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


 **Your ads will appear on Google search results pages.** 

Now you're all set to run your Google Ad Grant campaigns. Set up different campaigns for different needs of your nonprofit. Optimize your Google Ad Grants campaigns at least once a week to get the maximum benefit.

Check Compliance.

Google has launched a Google Ad Grants Account Review Dashboard, where you can check the most up-to-date information to be sure you're complying with the latest program policies and best-practice adoption. The dashboard refreshes every 48 hours and includes:

- **your current status** with program policies and guidance on how to comply
- **your current adoption of recommended best practices** (based on top performance among Ad Grants grantees)
- **actionable** next steps.

Google also provides extra support with your Google Ad Grants account from partner universities through an online marketing challenge program. 

Armina Fareed (arminafareed@gmail.com) is digital marketing consultant at Asante Africa Foundation (asanteafrica.org).

Creating a Vision


Communicating a vision that others buy into is a key part of leadership. But what goes into the making of a powerful vision? Rob-Jan de Jong answers that question in *Anticipate: The Art of Looking Ahead* (harpercollinsleadership.com). To do so, he divides tools, approaches, and ideas into four components:

Visionary content is what we discover when we tap into our imagination. Having such content allows us to discern between important and unimportant trends. It lets us extend our vision to what may at first be on the edge and use our inner vision to explore creative scenarios. Doing so requires giving ourselves some slack time to ruminate.

Visionary practices include openness, acceptance of minority perspectives, and the avoidance of groupthink. Such practices help us see important changes early, before others do, and make connections between the initial impact of a small change and its later meaning.

Visionary communication is necessary if we're to speak to the hearts of others who will join us in attaining our vision. If we don't communicate our vision with clarity and passion, few will be impelled to join us.

The visionary self is the personal dimension of visionary behavior. Creating such a self means understanding our mindsets, attitudes, and values to ensure the authenticity of our vision.

Focusing on old habits, thoughts, and resources anchors us in the past. Our true potential emerges when we explore and stretch ourselves. It's easy to get stuck in the familiar, day-to-day aspects of our work. But making time for reflection, projects outside our expertise, and networking to bridge ideas will help us think more like leaders. 

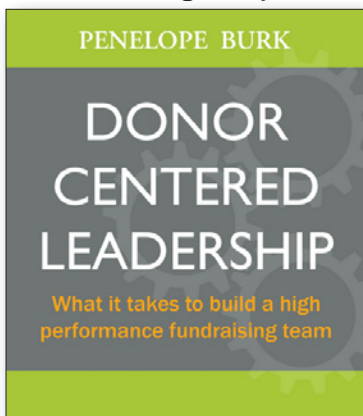
—reviewed by Terence Fernsler

Build a High-Performance Fundraising Team

The good news is that all the fundraising strategies necessary to maximize profit already exist. The bad news is that few nonprofits are using them. Penelope Burk details keys to financial security in *Donor Centered Leadership* (Cygnus Applied Research, cygnus@cygresearch.com):

Have a talk with your board. Studies show that many board members are unclear about their role in raising money. Most say that their fundraising responsibilities are to plan, supervise, and show up at events. They don't acknowledge the unique role they can play in persuading donors to give.

Don't insist on unrestricted giving. You'll get the best return if you offer people




information about how you'll use their gifts before they commit to a contribution.

Invest in major-gift and planned-giving programs. These badly-neglected strategies are highly profitable, allowing you to raise money at the attractive cost of four to ten cents on the dollar.

Ask one-on-one. There's too much reliance these days on volume-based appeals in the mistaken belief that we can raise money through arms-length approaches alone. The personal touch is still vitally important.

If you have to choose between bringing in new donors or keeping current donors happy, go with your current donors. Don't accumulate more donors than you can steward effectively.

Remember the rule: 90% of money raised comes from 10% or fewer of the donors. Focus on meeting the needs of those 10% of generous donors rather than appealing to a large volume of supporters through mass marketing.

Don't over-solicit. Respect donors' definition of over-solicitation, which is "being asked to give again before learning what was accomplished with the last gift." 

Questions Matter

Asking the right questions is the best way to understand a problem and come up with a solution, explains Bernhard Schroeder, author of *Simply Brilliant* (harpercollinsleadership.com). A powerful tool is the Phoenix List, which was developed by the CIA to help with tough challenges. There are two steps:

1. Ask "problem" questions to identify possible solutions.
2. Ask "plan" questions to refine the solution you decide to implement.

Here are examples of questions to ask:

THE PROBLEM

Why is it necessary to solve the problem?

What benefits will you receive by solving it?

What is the unknown? Can you think of a familiar problem having a similar unknown?

Can you separate the various parts of the problem? What is the relationship between these parts?

What are the best, worst, and most probable cases you can imagine?

THE PLAN

Can you solve the whole problem? Part of the problem?


What would you like the resolution to be? Can you picture it?

How much of the unknown can you determine?

What have others done?


What should be done, and who should do it? Where and how should it be done?

How will you know when you've been successful?

Using this method, you'll increase the likelihood of developing the right answer to the problem – and increase your knowledge base at the same time. Question everything until you arrive at the best solution, says Schroeder. Then empower people to enact it. 

Four Steps toward Transformative Learning

How can we move forward to welcome change within the chaos of our world, our organizations, and our daily lives? A first step is to recognize the need for collaborative learning that celebrates rather than impedes change. A second step is to join together to answer four questions that focus on the change we wish to make:

- 1. What is the ideal result for each participant in the change enterprise?** The answers reveal people's values, goals, visions of the future, and hoped-for outcomes.
- 2. Which current facts and circumstances support the change, and which may provide barriers to it?** What strategies might capitalize on the opportunities while mitigating the threats?
- 3. How can we bring everyone's interests together to create something better than any could contribute alone?** This step requires people to brainstorm ways to extend individual goals into broader, mutual goals that everyone can embrace. The more creative, diverse ideas the better at this stage.
- 4. How can we put those creative ideas into practice so that ongoing learning can take place throughout the organization?** Collaborative action is the essential final step. Once the learning has been tested in action, it becomes actionable knowledge. 


—adapted from *Collective Learning for Transformational Change* (Routledge, routledge.com)

An Exercise to Spark Creativity

In *Your Creative Mind* (redwheelweiser.com), Scott Cochrane describes how he coaches groups through an exercise that results in amazingly creative solutions.

- 1. Someone in the group selects an object out of a box.** The object might be anything – a coffee grinder, an umbrella, a tennis ball.
- 2. The group lists 15 characteristics of the object, 15 potential uses, and 15 things the object might say or feel.** For example, a tennis ball might be described as round, green, fuzzy; it could be used for playing tennis, juggling, or massaging sore muscles; if it could talk, it might say it wanted to be played with more, and so on.
- 3. The group associates the qualities from its list to the problem at hand.** For instance, the group might ask, “What would a round solution look like? What would a green solution look like?”

“Time and time again, this technique has yielded some incredible solutions,” Cochrane says. “The process will reliably produce ideas that would never have come up otherwise.”

He adds: “By forcing the mind to associate two objects or ideas that appear to be completely unrelated, the brain is forced to form new connections and ignore old ones.” At the same time, by focusing on an object's fictional “soul,” you're putting yourself into the mindset of a creator. As he notes, whenever you create something, you are, in a way, putting a little bit of your own soul into it. 

Don't Just Say No: Say Yes to Alternatives

The United States federal government and many state governments are turning their backs on the cooperative role the nonprofit sector has had with them for the last 50 years or so. The government-nonprofit relationship is becoming increasingly adversarial as those governments shift from a focus on social equity and democracy to corporate principles, at a time when those principles are becoming less humane.


Welcome to the Revolution: Universalizing Resistance for Social Justice and Democracy in Perilous Times (routledge.com) explores intersectionality – a fancy academic word for collaboration – as a

means of achieving social justice. Nonprofits can play an important role in the democracy movement, and it begins with questioning the affinity for hierarchy and workplace authoritarianism. It includes aligning nonprofits with one another and with civil-society groups that aren't organized under traditional structures.

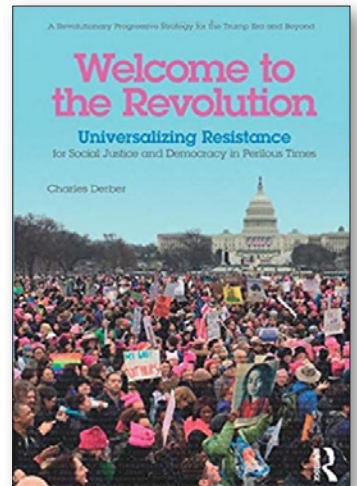
Author Charles Derber explains how today's dominant system

increasingly causes suffering. We can be so entrenched in it that we begin to believe there's no alternative. Prosperity sustained over a lifetime conditioned many of us to equate capitalism with democracy. But capitalist elites have been building inequality, and now capitalism has entered a new, crueler stage in which millions – even billions – of people are disenfranchised, facing many knotty challenges. These people often end up as beneficiaries of nonprofits. Working together on their challenges is increasingly crucial to meet their needs and our organizations' missions effectively.

You can't fight the system without a positive alternative, and Derber suggests several. These include a green economy, rooted in harmony with nature, and a system in which organizations build coalitions, especially among the poor and oppressed classes.

Emboldened authoritarianism forces nonprofits to reflect sooner rather than later on their roles in society. To participate in the authoritarian culture – Derber's “culture of death” – will find us falling short of meaningful purpose – the purpose we give our organizations through mission and vision. Working together, learning together, and living together will improve our organizational impact and help us be better, more authentic social-justice organizations. 

—reviewed by Terrence Fernsler



The New Fundraising Frontier: Cryptocurrency


It looks like cryptocurrency is here to stay, and it's time for all nonprofits to get set up to receive donations in the form of cryptocurrency, according to Gail Perry (gailperrygroup.com). Cryptocurrency is the generic term that describes all types of digital currencies. That includes bitcoin – the most popular cryptocurrency and the one that gets all the press.

Why target crypto-investors as potential donors? Consider that investors in cryptocurrency tend to be younger, very digitally literate, and financially sophisticated, Perry says. Over 60% of cryptocurrency users are under the age of 40. And many of these may be crypto millionaires.

Crypto users are generally in the Millennial and Gen Z demographic, and, according to The Giving Block (thegivingblock.com), 43% of millennials prefer crypto investing to stocks, with many holding highly appreciated crypto that they can donate each year for tax purposes.

The GivingBlock experts say that many investors are literally shopping around for charities to support. The Giving Block is a technology platform for accepting cryptocurrency donations, and Perry recommends checking it out. She suggests that you target a fundraising campaign directly to crypto investors. The Giving Block is helping several charities launch these campaigns and seeing pretty amazing results, she says.

The number of investors is rapidly growing. Estimates are that 100-300 million individuals are users or investors in cryptocurrency, and crypto donations equal about \$300,000,000 each year. Interest is high around the world and only growing stronger.

“Not only is there a largely untapped market of very wealthy young individuals,” says Perry, “but very few nonprofits are out there in front of these donors. It's up to you and your institution to move now to capitalize on this new market.” If you'd like to learn more about cryptocurrency and getting set up to be listed on The Giving Block's website, contact thegivingblock.com. 

Are Nonprofits in an Innovation Deficit?


New data from Innovation Leader (innovationleader.com) shows that the pandemic is still having a huge impact on nonprofits. Their ability to innovate has been impacted by COVID more than almost any other industry, including healthcare, media, and more.

How can nonprofits move out of this innovation deficit? Scott Kirsner, CEO and co-founder of Innovation Leader, says, “In-person fundraising events and galas stopped like a heart attack and while overall donations were up for 2020, there were layoffs and hiring freezes for many nonprofits.”

Breaking through the noise continues to be a challenge. However, Scott says that there are steps nonprofits can take to catch up. Examples include:

Grow your presence on social media. As new media platforms like Clubhouse and TikTok emerge, nonprofits need to have a presence. Just doing Facebook and Twitter isn't enough anymore to spread the word to potential and current supporters.

Expand past credit payments. Accepting payments only via credit card is a massive limitation for nonprofits because younger donors prefer other options like Venmo, Paypal, or even cryptocurrency donations.

As for nonprofits doing it right post-pandemic, Scott points to B Lab in Pennsylvania, which has been getting attention to the B Corp certification process. And also, E for All in Massachusetts is expanding nationally and providing support for women and other underrepresented founders in non-tech, non-VC fundable businesses. “E for All did a stellar job shifting its programming for entrepreneurs online amidst the pandemic,” Scott says. 

Beyond the Briefs

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

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

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

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

Say Yes to Solving the Problem (Vol. 39, No. 2)

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

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

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

Planned Giving Tips for Every Organization (Vol. 23, No. 6)

Are You Making These Mistakes in Your Fundraising Letters? (Vol. 37, No. 4)

Three Simple Questions that Get Donors to Give (Vol. 35, No. 2)

How to Energize Your Thank-You Letter (Vol. 26, No. 2)

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

What's the “Right” Amount of Communication with Donors? (Vol. 36, No. 4)

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

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

Collaboration and Leadership: Secrets of Success (Vol. 24, No. 1)

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

Earn a Certificate in Nonprofit Leadership & Management



Learn online at your own pace

Earn 4.8 CEU / 48 CAE credits

Certificate from Michigan State University Extension

Discounted for Society members

The Learning Institute is a program of the Society for Nonprofits

snpo.org/certificate



The Learning Institute
For Nonprofit Organizations