

april / may / june 2023

second quarter

volume 41 • number 2

Nonprofit World

Advancement
Through
Sharing

A Planbook for the Future How to Get More of What You Want Done

PLUS:

- What Are the Most Annoying Buzzwords in the Workplace?
- Mental Health Challenges in Nonprofits: The Hidden Dangers
- What You Need to Know about Your Finances
- How to Lead a Remote Team
- Ten Cage-Rattling Questions to Ask about Your Fundraising Strategy
- Leverage Mobile to Gain More Supporters
- Secrets to High-Impact Leadership
- Can You Thank Your Donors Too Much?

... and more



Published by
**SOCIETY for
NONPROFITS**
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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.

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FEATURE ARTICLE

None of us can predict the future. But we can look to lessons of the past to make some good guesses and use them to forge a useful plan. **“A Planbook for the Future” on page 12** offers the keys you need to do so.

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is published by the
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The Merlin Method of Planning Your Future

Merlin, a wizard in King Arthur's court, is often portrayed as a prophet who could foretell the future. But the technique of figuring out what's coming isn't really augury. It's a trick we all can use.

The key is this: To see the future, first look deeply into the past. In "A Planbook for the Future" (page 12), Paul Lemberg shows us how.

Your review of the past may show that you've wasted time doing things that don't work – and then trying them again, and then again. In "Fresh Approaches to Board Recruitment" (page 10), Karen Eber Davis explains why you may not be getting the caliber of new board members you're seeking. Perhaps, she says, you're looking in the wrong place – and you may have been doing so for a long time.

Instead, she suggests, shift your eyes in a whole new direction and try something completely different. The results will be enlightening.

We can often turn what seems like a lack into an opportunity, as Brian Braudis makes plain in "Secrets to High-Impact Leadership" (page 20). Rather than seeing uncertainty as a cause for anxiety, we can see it as a chance for expansion, growth, and new directions.

"Three Common Mistakes Leaders Make with Underperformers" (page 30) makes it clear that we must look beneath the surface to the underlying cause of problems. That holds true whether you're helping people tune in to their talents, enacting a far-reaching change, or enhancing your organization's culture.

Hundreds of experiments prove the ways our brains trick us. Wray Herbert, who has been writing about psychological research for over 30 years, notes that the unconscious can be both wonderful and perilous. He sites evidence of many cognitive traps that can kill your plans if you don't stay on the alert.

Examples abound in every field. For example, people are more apt to support an organization whose name is easy to read and say. Using simple language makes a job seem less demanding and a choice less risky.

“The best place for ideas?
Your uncomfot zone.”



Subtle manipulations are shaping your choices, big and small, every day, Herbert tells us. "Your Secret Mind" (page 30) explains some of the most common and problematic ways your brain is being hijacked.

These snares blindside us because we're prone to choose what's familiar, expected, and easy. Doing so works fine in most of our daily routines. But we must be careful not to use such shortcuts when making critical decisions. The results could be devastating. And choosing the habitual rather than the new keeps us from seeing what's right in front of us.

That's why it's a good idea to spend time now and then in your uncomfot zone. When you're there, you're more likely to choose wisely, because you'll see everything with fresh eyes and be more deliberate in your judgments. To find your uncomfot zone, simply fire up your curiosity, step into new cultures, and allow yourself to dream.

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. Reach out to find new board members**, using one of the methods described in "Fresh Approaches to Board Recruitment" (page 10).
- 2. Ask the questions** in "Does Your Organization Have a Culture of Great Communication?" to assess your culture's strength and note where you need to improve (page 19).
- 3. Check that you're following** all the fiscal practices set out in "What You Need to Know about Your Finances" (page 15) to assure a successful financial future for your organization.
- 4. Read one or more of the articles** referenced at the end of "Your Secret Mind" (pages 30-31) to improve your decision-making.
- 5. Begin creating the perfect strategic plan** (or improving the one you have) by asking the questions on pages 12 and 13.

Can You Thank Your Donors Too Much?

The answer may surprise you.



By Tom Ahern

As a matter of fact, you *can* thank too much!

A committed donor recently e-mailed this message to the nonprofit she has been supporting:

“I wanted to tell you that it’s not necessary, or even desirable, to keep sending me thank-you letters every month for my little monthly donations. I don’t need to get them, and I think it’s a waste of time and money on your part to send them every month. One thank you at the end of the year, with an official list of my donations for tax purposes, is sufficient for me – and, I’m sure, for most, if not all, your donors.”

That’s just one person’s opinion, of course. But in my view it’s clearly “actionable.” (That’s researcher-talk: It just means, “Yeah, this is valid feedback. We should pay attention.”)

Maybe it’s time to ask your donors – perhaps annually or every two years – about their communication preferences. I’d wait until *after* a donor has made a second gift. That way, the donor has had some experience of the kinds of stuff you’ll be sending.

Asking donors for their “personal communication preferences” is *never* a bad thing. It builds relationships. If you’re boring them, they’ll tell you to ratchet it down. If you’re pleasing them, they’ll tell you, “Keep ‘em flying!”

Forward-looking CRMs (customer-relationship-management systems) let you specify exactly which kinds of communication any specific donor wants to get. This is a fundamental customer-service issue.

Monthly thanks are a bit of a conundrum, I admit. Many people prefer giving to charities monthly. But sending someone the same thanks 12 times a year (even if it’s kinda wonderful) gets old fast.

The chemical principle beneath all this is simple: When people make gifts, their brains release three pleasant drugs (dopamine, for example). So, reasonably speaking: Would donors rather get that “philanthropic high” 12 times a year – or just once (because they gave annually instead of monthly)?

The answer seems clear: 12 times is better than once. But – big caveat – if a charity’s boring, repetitive, predictable, robotic method of thanking people is maybe (who knows?) even *suppressing* that monthly release of chemicals (as it seems to be with the donor who asked her organization to lay off the thanking) . . . then, yup, you have to come up with an alternative.

The best way to find out if you’re pleasing or boring donors is, simply this: Find out what they prefer. And, the best way to do that? Ask them. 

Tom Ahern (a2bmail@aol.com, aherncomm.com) is a celebrated speaker, message strategist, and author of numerous books on fundraising, including What Your Donors Want.



To Thank Or Not to Thank

Saying “thank you” in the right way, at the right time, is a crucial skill. Find details in articles such as these at NonprofitWorld.org:

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

The Perfect Gift for a Major Donor (Vol. 36, No. 1)

The Power of the Reverse “Thank You”: Influencing Others Made Easier (Vol. 40, No. 4)

This Is How It Feels when You Don’t Acknowledge a Donor (Vol. 37, No. 3)

What’s Wrong with Thank You? Plenty (Vol. 22, No. 2)

What’s the Best Way to Recognize a Major Donor? (Vol. 31, No. 2)

Twelve Ways to Say Thank You (Vol. 16, No. 6)

33 Top Tips for Building Donor Bonds (Vol. 26, No. 1)

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

Ten Cage-Rattling Questions to Ask about Your Fundraising Strategy

Are you a fundraiser who's not getting the support you need? Ask these questions to start some productive conversations.

Q I'm in charge of fundraising at our small nonprofit. The problem is: I don't receive much support from the organization's CEO or board members. They don't seem to understand what fundraising actually entails. They expect miracles from me yet don't give me the resources or autonomy to perform my job the way I'd like to. Their goals and expectations are unrealistic. They keep asking me to focus on fundraising events, even though I've explained that the time spent on holding such an event more than once a year doesn't justify the small payoff. They just don't seem to listen to me or take my concerns seriously. I don't want to alienate anyone, but I'm at the end of my rope. What can I do?

A You're not alone. Plenty of fundraisers can identify with your situation. You're right in suggesting that it may not be appropriate or productive for you to tell off your leaders. You work for them. They choose whether or not to listen to you. Confronting them with the truth isn't likely to help you make headway. You need to frame your position artfully.

So, to help you, here are 10 questions you can (innocently) ask – questions that will gently help your leaders see things from your point of view, along with the main points you need to remember. These questions aren't confrontational. They're strategic and organizational. But they do put serious issues squarely on the table.

You have to ask these questions if you're serious about creating a smart fundraising strategy that everyone can buy in on. And doing so is vital to your organization's future.

Check out these questions and ask some of them – at the right time. They'll open the doors to hugely productive discussions.

1. Can we be honest about what's working and what's not working?

Most organizations are pretty set in their ways. Most staff and board members are in their comfort zone and don't want to disturb themselves. Nobody wants to rattle any

“Here are questions you can (innocently) ask.”

“Don't waste your organization's wildly precious resources.”

cages. Honesty may not be rewarded. Tough questions about fundraising strategy aren't asked.

Remember: *Creating an atmosphere of openness and honesty is essential if you want creativity and new ideas – and mega fundraising success.*

2. Can we make decisions based on data and not personal opinions?

How are decisions made at your organization? Do you rely on data and facts? Or do you make decisions based on people's personal preferences or opinions? There's often too much weight given to the opinions of the most powerful person in the room.

Remember: *Set your strategy based on data and research. This is a **must** if you want to reach epic fundraising goals.*

3. Are we willing to ditch unproductive programs?

Often there are special fundraising programs (especially events) that are no longer worth the time and effort. But they're protected by a powerful board member or the CEO.

Where are the time-wasting, unproductive fundraising programs in your organization? Can you speak honestly and ditch them?

Remember: *Don't waste your organization's wildly precious resources of time, energy, and money in places where it doesn't pay off.*

4. Are we willing to set \$ goals that are backed up with a plan?

Sometimes fundraising dollar goals are estimated, guessed at, or even pulled out of the air. Some organizations want more out of fundraising but don't want to figure out how to get there. They don't have a plan that will set up success.

Remember: *It's impossible to achieve great results without a detailed, calendarized plan and strategy.*

“You could see a return of 300-400%.”

5. What would happen if we invested more in fundraising?

If your organization invested more in fundraising, you would pay back the investment plus realize a significant return. Fundraising isn't a cost center. It generates revenue.

Remember: *Invest more in fundraising, and you'll see an exponential return.*

6. Can we encourage risk taking with a fundraising venture fund?

Some organizations set aside funding just for new fundraising ventures that offer promise. If you borrowed from your endowment and invested in expanding fundraising, you'd see a return of 300-400% – plus you'd pay the principal back.

Remember: *Venture investing in fundraising can be a smart strategy that yields substantial revenue.*

7. Can our entire organization embrace fundraising as a mission goal?

The nonprofits that integrate fundraising into their core mission goals are the ones who achieve maximum fundraising results. Every single person – from the folks answering the phones to the CEO and the board – needs to commit to fundraising.

Remember: *You'll see transformational results if everyone in the organization works together on a plan that's 100% supported.*

8. Can we all embrace and honor donors as important to our mission?

Honoring donors is the first step toward an organizational culture of philanthropy. When an organization does this, then mega fundraising is truly possible.

A true culture of philanthropy exists when everyone embraces donors as important, valued, and worthy of attention and honor. Your leaders may be nervous about the idea of fundraising, but they *can* get excited about your donors.

Remember: *An organization-wide commitment to your donors will lead to powerful fundraising development.*

9. Could we set aggressive, breathtaking goals?

Aggressive goals force everyone – from administrative staff to board members – to work differently. Aggressive goals get attention.

Remember: *You can accomplish unimagined feats if you marshal everyone's energy into a new set of transformational goals.*

10. What will it take from everyone to make this happen?

When it comes to honoring your donors and building a sustainable base of revenue for your mission, what's everyone's responsibility? What is each person committed to create?

Remember: *Everyone needs to be on board if you're to make the kind of money that not only funds your work but transforms your organization's potential and reach. Your organization's future depends to a large extent on the decisions you make about fundraising strategy. Remember that transformational results really are possible. You can aspire to incredible heights – and actually reach them. You can't imagine the amazing results that are possible until you give it a try.*

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



Make the Leap from Good to Great Fundraising

Fulfill your fundraising potential with articles from NonprofitWorld.org, including:

How to Foster a Positive Funding Relationship (Vol. 32, No. 4)

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

Fifty Shades of Fundraising (Vol. 33, No. 3)

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

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

You've Got To Know When to Hold 'Em, Know When to Fold 'Em (Vol. 17, No. 1)

E-Mail Mistakes that Could Be Damaging Your Fundraising (Vol. 36, No. 2)

How Can You Boost Donors' Trust in Your Organization? (Vol. 36, No. 4)

Breakthrough Tips to Boost Your Fundraising (Vol. 33, No. 2)

We Need to Elevate the Conversation about Inclusion

A champion for those with disabilities is on a crusade to promote a new way of thinking.

By Lloyd Lewis

Inclusion should be on the mind of every nonprofit leader, manager, and hiring professional in the country. As the CEO of one of Colorado's largest nonprofits and the father of a young man with Down syndrome, it's most definitely on *my* mind.

DEI – diversity, equity, and inclusion – shouldn't be a foreign concept to those of us in the nonprofit sector. But sadly, it sometimes is.

It's not that we don't have diversity and inclusion programs, it's that something significant is missing from many of them. Where we – as leaders and as a society – fall short is that how we view inclusion – the “I” of the equation – isn't inclusive enough. We make sure our hiring practices aren't biased when it comes to race, gender, and sexual orientation – but what about people with intellectual and developmental disabilities (IDD)? Too often we forget the need to include them when considering job applicants.

It's time to open our minds to how productive people with such disabilities can be – and to the invaluable contributions they can make. When you consider that there are approximately 6.5 million people in the U.S. who have an intellectual or developmental disability, it's shocking that they experience an 80% unemployment rate. In a world where employers are struggling to fill jobs, this is more important than ever.

There are several nonprofit organizations, like the Rees-Jones Foundation's Best Buddies Jobs Program and the DISH Foundation, that are doing great things to employ people with intellectual and developmental disabilities. The Global Down Syndrome Foundation, Arc of the United States, RespectAbility, Easterseals – all these nonprofits are helping to provide opportunities for people with intellectual and developmental disabilities. But more needs to be done, and we in the nonprofit world are perfectly suited to lead the change.

“This 80% unemployment rate is shocking.”

Myth versus Reality

The biggest hurdle we face is breaking down the barrier of misconceptions surrounding what it means to hire people with disabilities. Many believe that employing someone with intellectual or developmental disabilities is disruptive and time-consuming. Many worry that making the necessary accommodations to meet the needs of an employee who may have autism spectrum disorder (ASD) or Down syndrome is expensive and “too hard.”

The reality is quite different. For example, Arc Thrift Stores (arcthrift.com) employ over 400 people with disabilities in every department. They are cashiers, they work in donations, they stock the aisles, they interact with customers, they work at the corporate office. Some of these employees have Down syndrome, some have autism, some are in wheelchairs. Some are high functioning; some are nonverbal. But because of the way the store hires – for *fit* rather than job description – none of these disabilities is a problem. There's always a job that needs to be done, always someone able and willing to do it.

Of course, the store makes accommodations for their employees' disabilities, gives them special training, and mentors them. But, frankly, don't we make accommodations for typical employees? Don't we provide training and mentoring programs for them? Don't we sometimes need to deal with disruption? It's no different when managing someone with a disability.

The Benefits – Inclusivity in Action

Hiring people with disabilities is a smart strategy. The fact is that the benefits far outweigh the fears. Research from Accenture (accenture.com) supports this: Organizations employing people with intellectual and developmental disabilities have seen 28% higher revenue and are growing profits 4.1 times greater than their peers.

What You Can Do

It begins with a shift in the way we define disability and the way we think about what someone with a disability can do.

Look at the jobs that need to be done in your organization. You'll find that many jobs can be taken on – and done with remarkable skill – by someone with a disability.

Hire for *fit*, not job description. In other words, find people who will fit into the organization's culture rather than



“Have a conversation, not an interview.”

focusing on particular skills when you're assessing job applicants.

Have a conversation, not an interview, with job seekers. It's in these discussions that you'll truly get to know people and understand their capabilities.

Review your diversity, equity, and inclusion (DEI) policies to ensure that they include people with intellectual and developmental disabilities.

Network with local organizations that find jobs for people with intellectual and developmental disabilities in your area.

Be mindful and disability-friendly in your organization's culture.

Educate yourself and your team on disabilities; you'll find that there's no one kind of disability.

Work every day to debunk the myths and misconceptions surrounding employing people with intellectual and developmental disabilities.

And remember that there are many national and local resources available to you for assistance. There's the ARC, the American Association of Intellectual and Developmental Disabilities, the Global Down Syndrome Foundation, and many others. They're all just a simple Google search away.



Lloyd Lewis is CEO of the Arc Thrift Stores of Colorado (arcthrift.com), one of Colorado's largest nonprofits, social enterprises, employers of persons with intellectual and developmental disabilities (IDD), recyclers, and relief organizations. Under Lewis' tenure, Arc Thrift has funded over \$250 million to nonprofit causes and charities since 2005. Lewis has a 19-year-old son with Down syndrome.



Let's Shift the Conversation: Taking Inclusivity to the Next Level

In a webinar presented by the Society for Nonprofits (snpo.org/webinars), Lloyd Lewis outlines what nonprofit organizations need to know about creating a truly inclusive culture and provides tangible takeaways to help you create a more inclusive hiring program. A recording of this presentation is available at no cost for Society members.

“Many worry that making the necessary accommodations is “too hard.”

It's the Right Thing to Do, It Has Practical Benefits – & It's the Law

It's important to note that the Americans with Disabilities Act (ADA) was amended in 2008 to include people with intellectual and developmental disabilities, making it illegal to discriminate against them in hiring and other workplace policies. Thus, inclusion goes beyond championing those in need and carrying the flag of acceptance and tolerance. It's the law.

You'll find a plethora of insights on hiring, accommodating, and working with people with a range of differences – while avoiding lawsuits for discrimination or unfair practices – in the following articles, available free of charge at NonprofitWorld.org.

How to Write Effective Anti-Bias Policies (Vol. 30, No. 4)

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

Overcome Unconscious Bias in the Hiring Process (Vol. 39, No. 3)

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

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

How to Accommodate Common Disabilities in the Workplace (Vol. 31, No. 3)

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

Find Your Aces: Turn Your Handicaps into Opportunities (Vol. 35, No. 3)

Diversity and Inclusion – Why Now? (Vol. 29, No. 1)

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

How to Avoid Retaliation Claims (Vol. 21, No. 6)

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

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

Leverage Mobile to Gain More Supporters

Mobile has changed everything. Use these quick-strike tips to create a mobile strategy.

By Stefan Debois

People today are armed 24/7 with ever-more-powerful smartphones and tablets. Most are using their mobile devices to access the web. They're using these devices to read your opt-in e-mails, click on your links, and forward your offers to friends. They're rating their experiences and sharing photos in real time with their social networks.

If you want people's hard-earned income, loyalty, or even just their attention, you simply *must* embrace mobile. And you must develop a multi-faceted strategy to take advantage of it. Use these four tips to create an effective mobile strategy.

1. Make your website mobile friendly

More than half your customers are searching for your information using their smartphones. Three-quarters of them won't come back if your site isn't optimized for mobile.

More than 90% of websites aren't optimized for mobile, so optimizing yours becomes a competitive advantage.

“People love to have insider access to special offers.”

What's more, your mobile site can incorporate features like geolocation and tap-to-call that are unique to mobile devices.

An easy way to make your site mobile friendly is to create a dedicated mobile website, separate from your main site. This site will be served up automatically when people navigate to your website using a smartphone or tablet.

The drawback to having separate sites is that you'll need to coordinate the branding and content between the two. You can minimize that problem with responsive design – a set of web technologies that change the appearance of elements of your website depending on the screen size the site is displayed on.

2. Collect customer & prospect contact info

People love to have insider access to special offers. When you're interacting with them at an event, use a tablet to collect their e-mail address for exactly that purpose. Never use paper forms: They send the wrong message in this age of mobile. Offering a coupon or chance to win in exchange for contact information will boost the volume of contact details you collect. Even if you don't yet have a structured e-mail marketing process in place, you can start collecting info to build this asset for future marketing activities.



“More than half your customers are searching for your information using their smartphones.”

3. Use mobile to grow your social following

People engaged with someone at an event are great candidates to become Facebook or other social media followers. All you have to do is ask. Why not have them – right then and there – use their personal mobile to like your FB page or follow you on your other social outlets?

4. Engage event attendees using mobile

You can survey event attendees in real time via a quick-response (QR) code or offline with a tablet-based survey that will upload survey results the next time the tablet connects to the internet. This real-time interaction with your audiences yields a goldmine of fresh insights and opinions you simply won't be able to capture any other way. 

As the CEO of Pointerpro (pointerpro.com), Stefan Debois focuses on how to get the best survey results, backed with real-life data. Pointerpro is a software platform to create your own online assessments and automatically generate personalized reports.

More Website, E-Mail, & Social Media Tips

To sharpen your tech marketing, see these articles at NonprofitWorld.org:

- Ignite Passion by Connecting Online** (Vol. 34, No. 4)
- Integrate Social Media into Your Website** (Vol. 35, No. 1)
- E-Mail Mistakes that Could Be Damaging Your Fundraising** (Vol. 36, No. 2)
- Top Ways to Gain Support Using Pinterest** (Vol. 33, No. 2)
- Remember Your Brand when You Market with Social Media** (Vol. 33, No. 4)
- Why you Need an App for Fundraising** (Vol. 36, No. 3)
- How Mobile Marketing Can Work for You** (Vol. 32, No. 4)
- Accelerating Fundraising through Social Media** (Vol. 28, No. 3)



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

Fresh Approaches to Board Recruitment

Try these strategies to find new board members, attract new ideas, build diversity, and create feedback loops.

By Karen Eber Davis

When we look for new board members, we often round up the “usual suspects” – community members who are recognized, respected, and high-profile.

The results are often frustrating. And there’s a good reason for that: The usual suspects are “usual” because other nonprofits have already thought of them and added them to their boards. These busy people will either decline your invitation or, sometimes, join your board and then have little time for you and your mission.

You want – and need – to diversify your board. You recognize the value of inclusion both for the wisdom it brings and the positive impact it will have on your income and community building. How might you avoid the usual approach and succeed? Where might you look? Read on for three actionable recommendations.

1. Seek the Up-and-Coming.

Instead of stalking the usual candidates, find people who will be the top choice in a few years. That is, scout for:

- people seeking to enhance their resumes
- those who are new to town and want to get involved in the community.

Approach your CPA, banker, lawyer, and printer. Ask them about new hires in their firms and contact lists.

2. Ask for Advice.

Don’t eliminate the usual suspects. Rather, ask for their advice. See if they can point you to individuals with interest in your cause. Time your request after asking them to be your guest at a luncheon, attending their paid event, or treating them to coffee.

3. Give to Get.

Here’s a universal networking truth: To get, you must give. How can you help a collection of prospective board members with a need before you unveil your request? Ask. Listen. Offer.

“Step into other communities.”

Follow up. Intentionally, reconnect over the next three to six quarters. Repeat to grow a pool of prospects.

Bonus: Mindset Miracles

Diversity happens first inside your head. To plant the diversity seed and grow it, be curious. Step into other communities. Cross imaginary boundaries. Read on the topic.

Don’t do this alone. Enlist existing board members and staff. Urge them to be curious and attend others’ meetings and explore others’ communities.

Pick an action to begin today. 

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.



Create a Dynamic Board

Check out these articles at NonprofitWorld.org:

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

Four Steps to Effective Networking (Vol. 30, No. 1)

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

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

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

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

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

Should You Recruit Corporate Leaders as Board Members? (Vol. 29, No. 2)

“To plant the diversity seed and grow it, be curious.”

The Best Way to Understand? Listen

To connect with others, learn how to truly hear them.

Reviewed by Terrence Fernsler

Listen Like You Mean It: Reclaiming the Lost Art of True Connection. By Ximena Vengoechea. Hardcover. 315 pages. Portfolio/Penguin, penguinrandomhouse.com.

Meaningful conversation requires good listening skills. We too often focus only on what we're saying and how to say it, thinking if we can get our message across we can persuade others to agree with us. Thinking of others as a mere audience by speaking *to* them rather than *with* them, however, can make it hard for them to relate to us.

Conversations are openings to connect. They help us understand others' desires. They reveal common beliefs. While this book focuses on one-on-one interactions, it also applies to group dynamics and can help teams work together more effectively.

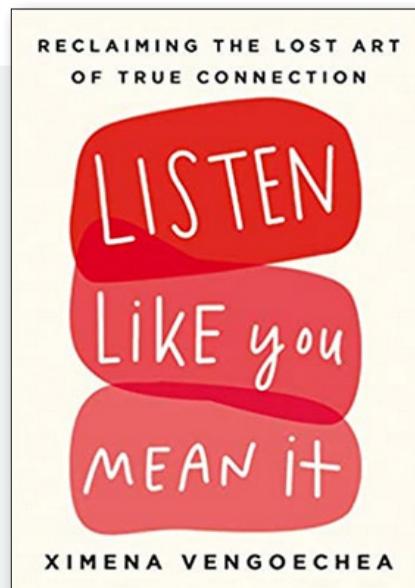
“Along the way you'll learn more about yourself.”

Ximena Vengoechea opens her book by explaining what affects listening. Your presence, the setting, and the way you pay attention can enhance or distract from authentic listening, so she suggests ways to reduce distractions. She then explores how to navigate through unmet needs and create the space to express concerns.

Exercises and examples throughout the book will help you become more present in conversations. Along the way you'll learn more about yourself. You'll discover your listening strengths and learn how to improve shortcomings. Vengoechea encourages developing your emotional intelligence to raise the bar in connecting.

Good listening earns people's trust. It teaches us about others and the hopes and fears we share with them. Learning to listen helps us meet each other as who we are.

Terrence Fernsler, MNPL, PhD, has been a nonprofit professional for over 35 years. He is currently an instructor and advisor in the James Madison University Nonprofit Studies minor program, an instructor in the Nonprofit Management and Leadership for the Master of Public Administration in the Bush School of Government and Public Service at Texas A&M University program, and principal of Sustainable Nonprofit Leadership Strategies.



Listen Up

Without careful attention, you may miss what your conversational partner is telling you. You may hear only part of the story or misunderstand it completely. *Listen Like You Mean It* offers strategies to encourage true conversation. For example:

Stay away from surface listening – the act of hearing the literal but not the emotional content. If you listen on the surface, you'll miss clues to the other person's perspective.

Get comfortable with silence. Don't rush to fill every quiet moment. Silence opens up space for people to fully express themselves.

Embrace empathetic listening, which happens when you seek to understand another person's inner world. To listen with empathy, you need to ask questions specific to the other person, then tune in to the answers – not what you expect to hear but what's really being said.

Set devices aside. Close your screens and put your phone away to minimize distractions. Encourage others to do the same.

Tap into feelings. Tune in to the underlying feelings that may be driving the other person's conversation.

Know your listening limits. Deep listening is tiring, so pace yourself, take a break when needed, and set boundaries so that you don't drain yourself.





A Planbook for the Future

Here are the steps to help you get more of what you want done.

By Paul Lemberg

You're pursuing a strategy en route to your vision. Whether it's revolutionary or evolutionary doesn't matter. You're on the road, driving in a direction of your own choosing. The important thing is that you have, in fact, chosen this course.

And, once you've made this choice, how are you to realize this strategy? The answer is just like the answer to "How do you climb Mount Everest?" One step at a time. The trick, of course, is to know what steps to take. This article details steps to a strategic, tactical plan.

Review the Past

The first step is to review the past period. For the balance of this article, we'll refer to that period as a year, although your planning horizon may be longer or shorter. You need to review the past for two reasons:

First, it's crucial to learn everything possible from your previous actions, results, and mistakes.

Second, you can pinpoint issues still hanging over your head. You need to let those issues go so that they're no longer a burden, a distraction, or a hindrance.

To complete this review of the past year, answer the following questions:

At the beginning of the past year, what were your intentions? What were your goals? What did you set out to accomplish?

Which intentions did you take action on? Which ones did you merely talk about?

Specifically, what did you actually accomplish? How effective were you? What percentage of your goals were realized? For instance, if your goal was \$14 million in income and you reached \$12 million, you were 85% effective.

What did you accomplish that you didn't intend? What were the unintended side effects?

In your opinion, what did you do "wrong"?

What did you simply skip?

One useful practice is to write a detailed, objective history of the past year. Document the year's events and results in journal form. Your records will be a big help. Use your date book and your ledgers to reconstruct this narrative.

“You need to move forward without dragging the past with you.”

Gather up whatever you learned. Three questions assist you in this phase:

What did you do that worked? In other words, what actions produced the results they were intended to produce?

What didn't work? What actions (or lack of actions) produced something other than the desired result?

What was missing? Were there missing resources, skills, knowledge, attitudes, or relationships which, if you'd had them, would have enabled you to be more successful?

At this point you should be ready to move forward without dragging the past with you.

Set Priorities

Using your values, beliefs, vision, and strategy as a guide, establish priority issues for the coming year. Presuming your resources are limited, you may not be able to impact all areas at once. Take a look at the following list. In which of these areas do you most want to make a difference?

- program development
- market penetration
- donor relationships
- global impact
- new customer growth
- employee retention
- state-of-the-art technology
- productivity
- new income
- customer satisfaction
- board recruitment
- geographic expansion
- community impact
- strategic relationships

Add other areas to the list. Then choose which you'll focus your attention on. Some prioritizing questions to ask are:

Which area is most important? Which will move you forward in the direction of your vision and goals?

Why is that area important?

What will a shift in that area provide to the organization (or specific categories of stakeholders)? What will not causing that shift cost the organization?

Create Measures & Goals for Each Priority Area

Once you've decided where you'll focus your efforts, it's time to establish measures for success. Here's where things can get tricky. The standard approach is to "look around" and try to figure out what's practical: "We did X last year. Well, we know how to do an extra 10%. So that's what we'll shoot for. We'll do X plus 10%."

The catch with this approach is that it will get you incremental, average results. And while there's nothing wrong with average results, you want extraordinary, breakthrough results. That means you have to step outside your normal confines and dream a little. Ask:

What will move us rapidly toward our vision?

What will quickly implement our strategy?

Set success measures that will inspire you! Don't think about how you'll achieve the measures or goals before you set them. That will only limit your thinking.

Establish a clear set of measures and goals for each area of focus. For instance, if geographical expansion is a top priority, your goal could be to expand into Canada. If it's board recruitment, success might be to add a new board member with financial expertise. Employee retention would be impacted by reducing turnover from 14% to 5% and providing 50% more training days for employees.

Place a time frame on each measure and turn it into a goal. "Increase total donors 10% by September 30" is a clear-cut goal. It fits nicely on the end of a timeline.

Create Initiatives

You have measures, you have goals. Now develop a plan to reach them.

For each measure within an area, invent one or more initiatives that will help you reach your goal. Sometimes achieving the goal will require a series of initiatives or a set of parallel initiatives. Increasing the donor base by 10% may involve direct mail, print and web advertising, e-mail, social media, and a phone campaign. Each of these initiatives then requires its own measures for success. And each one must be evaluated in terms of suitability, costs, and likelihood of success.

Develop Action Steps, Milestones, & Timelines

After you've chosen your initiatives, it's time to do the following:

Break each initiative into action steps and intermediate results.

Create a timeline for each of these steps and results. Include acquisition of missing resources and skills on the timeline.

Set regular milestones to keep the whole effort on track, and have a way to blow the whistle when things get off course.

Develop a tracking system, and update it regularly and often. You can use a big white board or flip-chart paper taped to the wall to display your timeline. Be sure it includes

CONTINUED ON PAGE 14

measures, milestones, and people's commitments of what they'll accomplish each tracking period.

Project-management software is useful for complex initiatives: It helps you visualize and account for "dependencies." If you use it, e-mail reports to all participants.

Adopt the Merlin Method

For some of your areas and measures of success, you're clueless: You simply have no idea how to achieve the results. In this case you can use the Merlin Method. Merlin, you may remember, was a magician and prophet who served as counselor to King Arthur. What you may not know is that Merlin didn't really predict the future. Legend says Merlin was born as an old man and lived his life growing younger. He was simply relating events which for him had already happened.

The Merlin Method is based on this same principle. Imagine you're standing at the end of a long timeline: You've already achieved your specific goal. Visualize how you did it. What actions did you take? What resources did you secure? Whose help did you enlist?

Ask these questions in a stepwise fashion starting from the end:

What was the last significant thing you had to do just before reaching the goal? Put that on your timeline.

And just before that, what did you have to do?

And just before that? And so on, moving closer and closer in time, right up until the present.

If you were taking a family trip, imagine yourself at your destination. What did you do just before you got there? You exited US 10 at exit 54. And before that? You exited US 15

“While there's nothing wrong with average results, you want extraordinary, breakthrough results.”

at Riverside, having driven 67 miles. And before that, you bundled the kids into the car. Before that you put the luggage in the trunk. Before that you packed. Before that you went online and got directions. And so on. Working backwards from the realization of the goal, you've developed a timeline, complete with milestones – working from your collected knowledge and wisdom but not necessarily from your conscious mind. The Merlin Method is a powerful way to generate tactical actions to realize your strategy.

For a reality check, think it through forwards. If you add the necessary resources, skills, and knowledge, take each action in turn, and reach each milestone, is that likely to produce the results you intend to produce?

You can even use the Merlin Method to generate alternative plans to evaluate against your other approaches.

Using one or more of these methods, you've developed a strategic and tactical plan. You now have a complete set of strategic priorities, measures, goals, and initiatives, along with action plans, milestones, resource requirements, and timelines – built upon your strategy and designed to realize your vision. 

Paul Lemberg (paul@lemborg.com, paullemborg.com) is the president of Quantum Growth Coaching and author of Be Unreasonable. He specializes in helping organizations attain sustainable, long-term growth.

Stay on the Right Track

Don't just make a plan. Keep it in front of you every day. For inspiration and actionable tips, see these articles at NonprofitWorld.org:

Can a Small Organization Create a Good Strategic Plan?
(Vol. 40, No. 3)

Your Future Just Walked in the Door – Or Out of It
(Vol. 18, No. 4)

What Nonprofits Need Are More Left-Handed Planners
(Vol. 18, No. 2)

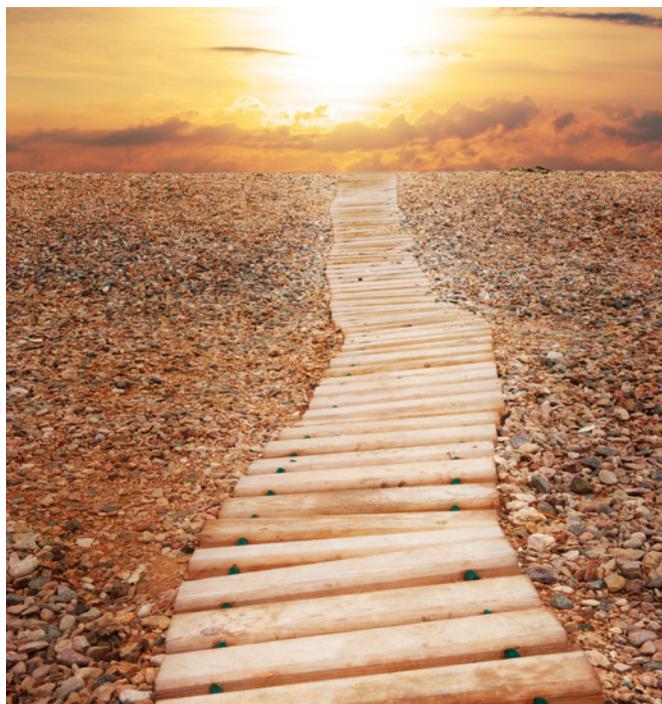
Will & Vision: Keys to Advancing Your Organization
(Vol. 26, No. 2)

Is Your Organization an Opportunist? (Vol. 17, No. 3)

Prepared & Resolved: How to Become Future-Ready & Make an Impact (Vol. 26, No. 1)

Don't Give Up on Strategic Planning: 10 Keys to Success
(Vol. 22, No. 3)

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





What You Need to Know about Your Finances

Safeguard your fiscal future with these guideposts.

By Ed Levin

No successful organization can exist without financial backing and good record-keeping for accountability. Consider the following to assure you have the funds and financial foundation you need to further your mission for the long term.

Keys to Financial Success

Establish good financial practices at the outset.

Although a nonprofit may start small, the importance of setting up good record-keeping and governance policies can't be overstated. An essential first step for nonprofit leaders is to set up and work with a finance committee immediately, to make sure that they're fiscally responsible and recording expenses properly. Nothing can bring an abrupt end to a nonprofit faster than mismanagement of financial resources.

Nonprofit leaders also need to work closely with their governance group to maintain guidelines for ethics, policies, and procedures. For example, while it might be easy for a committee leader to suggest taking the board out to dinner instead of holding a meeting in the nonprofit offices, is that an appropriate way to spend the money? As your organization

grows and increasingly becomes a steward of other people's money, you must consider adding financial policies that will endure scrutiny. One simple question to ask: Am I okay with the news of this decision being on the front page of the local paper?

It's also vital to establish an audit committee or hire an auditor – or perhaps, do both. You might consider bringing in outside expertise to move from a simple bookkeeping system to a more robust process as your organization grows.

These multiple layers of financial guidance and oversight help to safeguard your finances by showing that donations are properly accounted for and money is being spent appropriately. If you want your organization to last, you'll also need to consider longer-term strategies such as endowments, asset allocation, and rebalancing, especially if you want to attract donors likely to give larger amounts of funding year after year.

Assess cash flow needs and spending rate for both the short and long term. In the short term, examine your

CONTINUED ON PAGE 16

organization's needs for the next two to three years. You might ask: How much does the organization need to have, every year, in order to keep its doors open and fulfill its mission? What are overhead, staffing, and event expenses estimated to be for the foreseeable future? Once you have this information, it will be easier to identify how much money you must raise annually and how much establishing an endowment might help.

Simultaneously, consider your organization's longer-term needs. This gaze into the future should include looking at growth expenses, additional locations, research, and marketing, while also taking into consideration potential economic downturns.

If an organization fundraises, every year, only as much as is needed for its entire budget, it's doomed to fail in bad years. A good example is 2022-2023. At the end of 2022, the stock market was down, the bond market was changing, and donors didn't feel as wealthy as they did in the prior year. Organizations that didn't build the possibility of downturns into their planning were caught flatfooted, without the funding they'd planned to receive. It's critical to know what the baseline is and to try to raise that amount earlier in the year, as well as to know how an endowment can help.

Create an endowment fund, working with an attorney and financial advisor. An endowment fund is invested money that grows over time. It can help cover spending during those years when fundraising is more difficult.

For every organization, the percentage going into an endowment fund may be a little bit different. But the more that's endowed – maybe even 33 to 50% each year – the more it's going to assist with longevity. Leadership will worry less about the markets and current economy because they know the funding is there, generating interest that will help support the mission.

An endowment may cover some annual costs as well as some fundraising expenses, and it allows board members to think longer term and more strategically by knowing they have funding beyond the current year. In many cases, this fact changes the board from a management board to one that can leave day-to-day operations to the staff while it focuses on the future. Good planning far in advance can lead to longer-term success.

Assess allocation rates. For a nonprofit that's expecting to continue for the long term, what happens in the market today isn't as important as what happens over the next 10 and 20 years. Both investment allocations and asset

allocations must be appropriate based on the amount of risk the organization can handle. Risk and allocations should be reviewed on a regular basis (quarterly, semi-annually, or annually, not every week).

Be transparent. This requirement falls to the audit and finance committees. People who donate, especially those who donate large amounts of money or leave bequests, want to be able to see the nonprofit's financial records, and they care about ratings on Charity Navigator and Charity Watch. If the nonprofit has no audited records and doesn't disclose amounts on IRS Tax Form 990, financial advisors won't recommend it to their clients for funding.

Strategic Philanthropy Insights

Wealthy philanthropists have become much more strategic in how they choose to support nonprofits. Wealth is now being galvanized with the goal of contributing significantly to societal improvements or disruptions to the status quo, and philanthropists are looking far into the future, seeking the betterment of the environment, of healthcare, and of humanity itself. To attract these donors, you must show them the impact your organization can make.

Strategic philanthropists have four defining characteristics:

Innovation: Such philanthropists take risks that other types of funders might not support.

Evidence: They require evidence that the problem can be solved and that the nonprofit's plan is meeting milestones.

Collaboration: They look to see if other philanthropists, specialists, and institutional funders are joining, thus prioritizing the ability to achieve maximum scale and impact.

Scale: Their ambitions extend to solving larger, more complex challenges of a regional, national, or global nature.

Strategic philanthropy is designed to tackle the root cause of a problem. In doing so, the impact can be greater and certain problems may even be eradicated. The strategic approach may require much larger sums of philanthropic capital. Therefore, this movement by donors uses innovative financing vehicles for philanthropic purposes that incorporate pay-for-performance, results-based financing, and accountability measures.

Social finance is an impact-inspired category within philanthropy, whereby private capital is introduced into the equation to address substantial and pressing societal and environmental issues. Donors are "investors" in these models and look for the organizations they support to generate a measurable social (and sometimes financial) return.

Some philanthropists have a personal connection to a specific topic, issue, or geography. Others hope to create a change that will have a lasting, positive impact for their family or society. And others seek to embed topics that matter – to themselves, to other people, to the planet, and, perhaps, to their portfolios – into how all their capital is deployed to

“An endowment allows board members to think longer term.”

minimize risks and maximize opportunities. Ultimately, all of them are thinking about their legacy and how they want to leave the world or society in a better condition. 

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The information contained in this article is not a solicitation to purchase or sell investments. Any information presented is general in nature and not intended to provide individually tailored investment advice. Investing involves risks and there is always the potential of losing money when you invest. The views expressed herein are those of the author and may not necessarily reflect the views of UBS Financial Services Inc. UBS Financial Services Inc., its affiliates and its employees do not provide tax or legal advice. You should consult with your personal tax and/or legal advisors regarding your particular situation. Asset allocation and diversification strategies do not guarantee profit and may not protect against loss. As a firm providing wealth management services to clients, UBS Financial Services Inc. offers investment advisory services in its capacity as an SEC-registered investment adviser and brokerage services in its capacity as an SEC-registered broker-dealer. Investment advisory services and brokerage services are separate and distinct, differ in material ways, and are governed by different laws and separate arrangements. It is important that you understand the ways in which we conduct business, and that you carefully read the agreements and disclosures that we provide to you about the products or services we offer. For more information, please review client relationship summary provided at ubs.com/relationshipssummary, or ask your UBS financial advisor for a copy.

Ensure Your Financial Longevity

If you stay fiscally responsible, you have a much better chance of gaining funds, managing your resources, and accomplishing your mission for the long term. You can gain further insights in these articles at NonprofitWorld.org:

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

Avoid an Unwanted Auditor's Letter (Vol. 33, No. 3)

Investment Strategies for a Smooth Financial Future (Vol. 35, No. 3)

Good Cash Management Shows Good Stewardship (Vol. 25, No. 6)

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

Stay in the Money: Keep Cash Flow Problems from Derailing Your Organization (Vol. 31, No. 1)

The Bucket System: Managing Your Assets in the Face of Volatility (Vol. 35, No. 2)

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

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

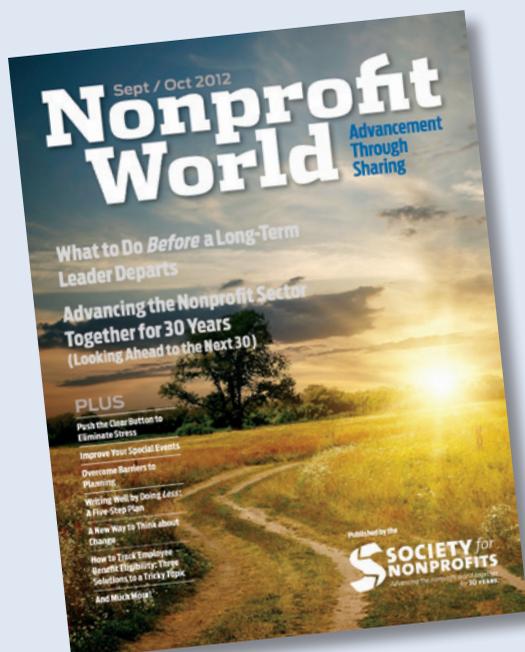
A Zeal for Endowment (Vol. 25, No. 4)

Do Your Board Members Understand Their IRS Obligations? (Vol. 36, No. 3)

Risk Management: How to Protect Your Assets (Vol. 26, No. 1)

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

Coming Up in *Nonprofit World*



- Thinking Differently about Your Elevator Speech
- Don't Let Jargon Destroy Your Message
- Strategies to Reboot & Refresh
- All the Reasons Not to Keep a Journal
- Do You Know the Two Types of ROI? Do You Have Both?
- Best Practices to Budget (& Spend) for Marketing
- Tech Tips to Punch Up Your Communications
- Creating a Fundraising Board
- Teach People "How to Think"
- Your Wording Can Boost Donations by Over 300%

Plus much more!

How to Lead a Remote Team

No matter where your workers are, lead them to success with these tactics.

By Chris Dyer

The movement is growing: More and more organizations are going partially or fully virtual. It's a move that requires two different mindsets to handle two major initiatives:

- **paying attention** to internal policies and systems
- **honing** a style of leadership that's at once hands-on and hands-off.

Here's how to sustain this balance:

Get Your Systems in Place

Effective leadership hinges on each member of the team being treated equally. That means having systems that work seamlessly, no matter where workers are located. Follow these guidelines:

Establish workflow processes so workers know what success looks like in their roles. Before each project, customize these templates, and let people discuss the new blueprint. They'll thus have a map of where to begin, where to end, and how to get there.

Standardize information by installing a few communication and computer-network technologies. Comprehensive

programs like Slack, for instance, offer communication options you can adjust for your team, project, or data needs.

Use online video technology so people can meet when they're in different locations. Some people swear by Skype. This and other interactive tools like Zoom, Webex, and GoToMeeting provide audio and video connections for groups of all sizes. Such online tools facilitate collaboration and record-keeping with features that include computer screen sharing, meeting recording, transcription, and even voice translation services.

Share documents using online systems such as Dropbox, Google Drive, and other cloud storage services, which allow multiple users to view, edit, and exchange digital files.

Train People to Communicate Effectively

Boost communication for remote workers (and everyone else) with these tips:

Make the organization's communication policy known to all.

Survey staff to find out the way they prefer to be contacted. Some gravitate toward voice calls, some toward text or e-mail. When there's a choice, and when individual



preferences are made public, employees know the quickest route to contacting coworkers.

Train people to listen well. You can do so formally, through workshops or role playing, or less formally, by demonstrating and insisting on thoughtful listening during meetings and other interactions.

Hone your own listening skills, too. Listening comes first; effective speaking comes second. Information is less open to interpretation when everybody knows how to listen, ask clarifying questions, and confirm that what they heard was what the speaker meant to say.

Create a Healthy Feedback Loop

Feedback is the key to success for employees, especially when they're working outside the office:

Have a system to give and receive feedback.

Offer feedback on a continual basis rather than holding annual reviews or closed-door sessions.

Check in with people daily or weekly, using their preferred method of contact.

Consider sending quick questionnaires weekly to receive input.

Hold a group debriefing after every project.

Make it fun. When conducting surveys or gaining feedback in other ways, throw in a trivia question or anecdote. Share personal stories, and ask others to do so. Make warm, human connections as often as possible. 

Chris Dyer is a performance expert, speaker, and consultant. He has channeled what he has learned in his research and as founder and CEO of PeopleG2, a leading background-check company, into his best-selling book, The Power of Company Culture (koganpage.com).

Lead Your Team, Near & Far

No matter where your employees are, lead them with articles such as these at NonprofitWorld.org:

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

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

Rate Yourself as a Servant Leader (Vol. 31, No. 1)

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

What Makes a Great Team? (Vol. 32, No. 6)

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

Cloud Communication: A Go-To Strategy to Keep Connected, Cut Costs, & Achieve Your Goals (Vol. 32, No. 4)

Does Your Organization Have a Culture of Great Communication?

A tenet of good remote teams is great communication, and that begins with the right culture. In his thorough, cutting-edge book *The Power of Company Culture*, Chris Dyer explains how to build a culture that improves communication, performance, and success. Here, in simplified form, are some of his pillars of a successful culture – and questions you can use to assess your own organization's culture:

TRANSPARENCY

Is everyone empowered to raise concerns and ask questions – with confidence that they'll get honest responses?

If you keep any information secret, why? What might the benefits be if you released this information?

POSITIVITY

Do you consider saying "Yes" before you respond with "No"? Are you careful to say "Yes and . . ." rather than "Yes but . . ."?

Do you encourage people to laugh, share, have fun, and be spontaneous?

MEASUREMENT

Do you know what key performance indicators (KPIs) predict success for your organization?

Do you conduct surveys and market the results?

ACKNOWLEDGMENT

Do you thank people often in as many ways as possible – with words that praise specific things they've done and with actions such as spending time with them, inviting them to lunch, or just asking them how things are going and listening to what they have to say?

Do you have a system to make sure all donors are thanked within 48 hours of receiving their gifts?

LISTENING

Do you listen to understand, rather than to reply?

Do you have a process in place to ask employees for their suggestions – and do you listen and respond to those ideas?

MISTAKES

Do you share your own mistakes and encourage others to share theirs without fear of reprisal?

Do you record information learned from mistakes in a searchable database for later use?

Secrets to High-Impact Leadership

Use these leadership keys to turn problems into innovations.

By Brian Braudis

An organization is only as strong as its leadership. You can increase your own impact – and that of upcoming leaders throughout your organization – by putting the following keys into action.

Shift the Energy of Your Team

You can't remove negativity without replacing it with something. Use purpose to drive the conversation. Talk about your mission. Get your team excited about the future you envision. When your team has a growth mindset, it's only natural that your organization will grow.

There will always be uncertainty. But when you shift your team toward purpose and show your own commitment, anxiety drops, morale increases, and team members follow your lead.

Cultivate Creativity

Open the floodgates of creativity by asking more questions. The days of a leader with all the answers are past.

Team members are intimately familiar with problems. They simply need you to provide them the space to contemplate how today's problems can become tomorrow's innovations.

Ask powerful questions, and be patient. Ideas will come pouring out in the discussions.

Use Influence, Not Power

No one likes a pompous leader. Rather than relying on the power of position, reap the long-term benefits that come from building trust and influence.

When you rely on the power of your position, you not only expose weakness in yourself, you build weakness in others by forcing them to acquiesce. You stifle their growth and the potential for their unique contributions. Ultimately, the entire relationship is weakened. Defensiveness ensues, low trust

“Ask powerful questions, and be patient.”

“Eschew these “killer Cs.””

follows, and potential for cooperation is lost – smothered by negative emotion.

Fight the impulse to command. Invest in the higher, more refined skills of finesse, influence, and persuasion – the building blocks of increased impact.

Promote Daily Progress

Leaders are deemed successful only if they get results, and they get those results through working with people. On any given day, your team's efforts will be influenced by a mix of perceptions, emotions, and motivations that can either pull them to higher performance or drag them down.

As a leader, you have tremendous influence in promoting daily progress. You can do so by ensuring people have the environment they need to maintain momentum.

Avoid the toxicity of high pressure. Rather, set clear goals for meaningful work. Give people autonomy and ownership of the outcomes. Nourish your team's efforts by minimizing daily hassles, showing respect, and offering words of encouragement.

Build a Body of Behavior

Be more of a model than a critic. Eschew these “killer Cs”:

criticizing	comparing
complaining	colluding
competing	contending.

Instead, talk about what went well. Add energy to the context. Show your team what's possible. When they know they can count on you for support and direction, momentum skyrockets.

Focus on What Is Right, Not Who Is Right

Team members rely on leaders to create an environment that is impartial, where everyone has the same opportunities that are based on merit. Don't take sides. Use conflict to demonstrate your commitment to organizational success.

“Use conflict to demonstrate your commitment to organizational success.”

Model a higher perspective that lifts others from their petty preoccupations and carries them above the fray. Be a stronghold trailblazer who guides the upward purpose of your team.

A leader's unique actions create ripples that spread, delivering ever-increasing impact that can be felt within and among teams. Set the behavioral norm by becoming known as the leader interested in organizational success over individual success. When you employ these secrets and increase your leadership impact, you set up your entire team for success.



Brian Braudis is a certified coach, speaker, and author of High Impact Leadership: 10 Action Strategies for Your Ascent.

The Path of a Leader

There are many shades and shadows on the leadership journey. For perspectives on some of these facets, make a note of these articles at NonprofitWorld.org:

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

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

Build a Winning Workplace Culture (Vol. 39, No. 3)

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

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

Do You Have the Skills of a Servant Leader? (Vol. 28, No. 6)

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

Top Tips to Lift Your Leadership (Vol. 38, No. 2)

Eight Steps to Managing Conflict (Vol. 20, No. 4)

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

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

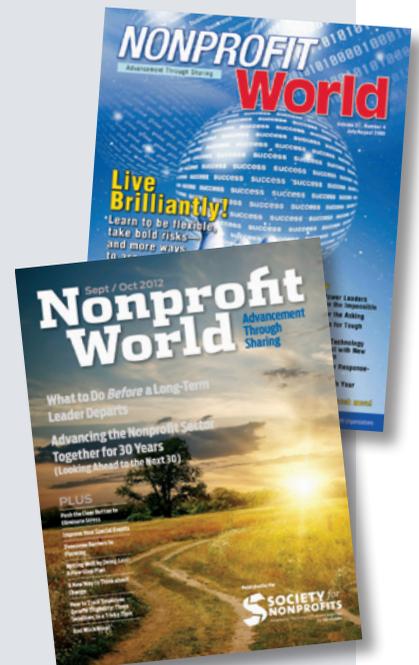
Be a Better Leader by Being a Careful Listener (Vol. 37, No. 1)

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Is a Performance Audit in Your Future?

Performance audits tell you much more than the usual audit can.

By Oscar Adongo

What Is a Performance Audit?

A performance audit gives you new information regarding a measurable performance aspect (such as effectiveness, economy, efficiency, or timeliness) of your nonprofit's program. The audit assesses the inputs, processes, and outcomes of the program.

According to the General Accounting Office (GAO), a performance audit provides objective analysis, findings, and conclusions to help managers and leaders:

- **improve** program performance and operations
- **reduce** costs
- **facilitate** decision-making by those responsible for overseeing or initiating corrective action
- **contribute** to public accountability.

Performance auditors are guided by the GAO's Government Auditing Standards, also known as generally accepted government auditing standards (GAGAS).

How Can a Performance Audit Help You?

Here are five ways a performance audit can help your organization:

“A performance audit is like a searchlight.”

1. A performance audit will give you a broader view of your program's performance than you would get in the usual financial statement audit. For example, say your nonprofit owns a building. A financial audit will only verify that the building exists, your nonprofit is the legal owner, the building is recorded in your books at its fair market value, and that it's reported in the right reporting period. A performance audit, however, can answer questions such as:

- **Does the building meet** the nonprofit's needs?
- **Was it purchased or financed** at the best possible price?
- **Is the space being used** efficiently?
- **Does the nonprofit really need** this building?

2. A performance audit gives you the flexibility to focus only on areas of significant concern. While a financial audit is like a fixed light trained on one area, a

“You have much more flexibility than in a financial audit.”

performance audit is like a searchlight that you can move and train on various components of your nonprofit. For example, while a financial audit generally has the same audit objective and scope every year, each performance audit has a different objective and scope.

The objective defines where to direct your searchlight. For each audit, you can change the objective to focus on an area of concern – each time shifting your searchlight to a different part of your organization. As an example, say your nonprofit provides food to families in Kenya, and you want to know if you’re meeting your goal of alleviating hunger. You ship tons of donated foodstuff to Kenya but you’d like to know whether the recipients qualify as poor (based on, for example, the poverty guidelines of the World Bank) and whether the food donations are making a difference to the recipients. The audit objective would be to determine whether your food program is effective. For the next performance audit, you may decide that you’d like to know whether your nonprofit is adequately staffed to deliver on its goal. This time, your objective will be related to workforce and employee headcount.

The scope defines the boundaries of your searchlight. You can widen or narrow the scope as you feel necessary. While you’ve focused your searchlight on a particular area of your nonprofit, you now determine how wide you want the beam to be, recognizing that having too wide a beam will result in the searchlight losing its intensity and focus. For your nonprofit with operations in Kenya, you could ask the auditors to limit their scope to only the past two years of your program’s operations in Kenya or narrow the scope to activities in specific locations in Kenya.

3. The auditors will identify areas where the program’s performance is inadequate – commonly referred to as the auditors’ “findings.” A finding includes

- **the condition** as it currently is
- **the criteria** used to evaluate the inadequacy
- **possible causes** of the inadequacy
- **the effects of the inadequacy** on the program’s operations.

Knowing all the elements of the finding will give you invaluable insight into any inadequacy and how it affects your program, allowing you to make more informed decisions on where to allocate resources.

4. The audit report includes recommendations on how to remedy any inadequacy identified in the finding. The recommendations, required by auditing standards for every finding, give you a roadmap to addressing the finding.

If you follow the roadmap and promptly implement the recommendation, the inadequacy will be addressed and your program will avoid the negative impact that the finding anticipated.

5. Auditing standards require that the auditor be on the lookout for internal control deficiencies, fraud, waste, and financial abuse. If there’s a deficiency in any of these areas, it’s vital that you be aware of it and know how to address it. If the auditors come across any of these issues, they’ll bring it to your attention.

A Missed Opportunity?

Performance audits performed in compliance with GAGAS aren’t widely used by nonprofits. If used correctly, however, your organization, your board, and your donors can benefit from the insights that such audits provide. 

Oscar Adongo is a performance audit manager with Performance Aspects LLC (performanceaspects.com, reports@performanceaspects.com), a minority-owned CPA firm based in Glen Allen, Virginia. The firm specializes in conducting performance audits for nonprofits.

“The finding will give you invaluable insight.”

Minimize Risk with These Articles

Get a handle on your organization’s performance and financial health with articles at NonprofitWorld.org:

Are You Breeding the Conditions for Fraud to Occur? (Vol. 39, No. 3)

New Internal Control Guidance: What You Need to Know (Vol. 28, No. 1)

Performance-Based Management Builds Funding & Support (Vol. 23, No. 6)

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

Exposing the Beast: Seven Deadly Wastes in Nonprofits (Vol. 36, No. 4)

Get Ready for a Better Audit (Vol. 30, No. 2)

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

What’s the Best Way to Avoid Financial Misuse? (Vol. 36, No. 3)

Risk Management: How to Protect Your Assets (Vol. 26, No. 1)

Key Performance Indicators: Nonprofits Need Them, Too (Vol. 31, No. 2)



Mental Health Challenges in Nonprofits: The Hidden Dangers

Be sure you're paying attention to this threat.

By Gleb Tsipursky

As a coach to nonprofit leaders, I've seen the problem far too often: Nonprofit boards pose a serious threat to the mental health of executive directors and other senior staff. In my experience, board members are rarely trained to recognize mental problems. This lack of understanding often leads to dismissive – even biased – attitudes toward people with mental health issues.

At the same time, research shows that 18.9% of U.S. adults – 46.6 million people – live with a mental illness.¹ What's even more alarming is that those in top leadership positions suffer from mental health issues at far higher rates than the rest of the population.²

Other studies show that women in positions of authority tend to suffer from depression in particular.³ The nonprofit sector is unusual – and praiseworthy – for the proportion of women in leadership positions, but that does make it especially important for nonprofits to emphasize the importance of addressing mental health challenges among staff.

We know from extensive studies that mental health challenges and burnout cause valued key employees to leave.⁴ I've seen it happen. For example, I coached the executive director of a mid-sized nonprofit who experienced strong pressure from several board members over fundraising goals. The executive experienced growing anxiety and stress. While I urged him to tell board members about his mental health condition, he refused to do so for fear they wouldn't support him and might even fire him if he revealed his “weakness.”

He had some reason for concern. The board had already turned down his request to revise the health plan to provide more support for employee mental health issues, dismissing the importance of dealing with this concern. Moreover, he had seen others hide their mental health challenges due to fears about board reaction.

But I thought it unlikely that they would fire him. Instead, I believed his fears were due to pessimism bias – an excessive perception of risks and a negative outlook on the future.⁵

Make Better Decisions by Understanding Your Brain

In three enlightening, readable books – *The Blind Spots Between Us*, *The Truth Seeker's Handbook*, and *Never Go with Your Gut* (intentionalinsights.org) – Gleb Tsipursky addresses the cognitive biases that can derail our decisions. As he explains, our brains are prone to a variety of thinking errors that can lead us astray if we're not careful.

BE WARY OF THESE TRAPS

Confirmation bias causes us to ignore information that doesn't fit our beliefs. The stronger we feel about an issue, the stronger this tendency.

Loss aversion leads us to avoid taking risks for fear of losing more than we'll gain. As a result, we sidestep exciting opportunities.

Attentional bias occurs when we attach too much weight to something because we're emotionally attached to one aspect of it.

The overconfidence effect prompts us to believe we're more skilled in decision-making than we really are.

The planning fallacy takes place because we tend to assume that our plans will go well and thus fail to build in enough resources to fix potential problems.

Optimism bias leads us to be excessively optimistic about the future. Studies show we believe our risk of suffering negative effects is less than it actually is, and our belief in positive events is greater than reality. We overemphasize the benefits of our projects and underestimate the costs and time it will take to complete them.

The false consensus effect causes us to overestimate the extent to which others agree with us, creating a sense of false alignment with them.

Pessimism bias is common for those with anxiety or depression.⁶

His pessimism didn't serve him well. The board continued to pressure him. Despite his wise decision to seek professional help, his anxiety and stress undercut his fundraising capacity. Finally – after he told me he was thinking of quitting – I convinced him to reveal his condition to the board.

Well, guess what? The board expressed a great deal of support. The board members who had pressured him said they did so because they felt anxious themselves over the state of the organization's finances. The board agreed to step back from its fundraising goals and do some cost-cutting instead.

The story didn't have a happy ending. The cost-cutting led to layoffs that undermined staff morale. Employees expressed their discontent to the executive, who was already close to burnout, and the stress from these and other conflicts

ADDRESS AVOIDABLE DISASTERS

Here are ways to keep your cognitive biases from leading you into trouble:

Always be ready for your existing practices and processes to fail you, and have contingency plans.

Avoid denying negative information, and be proactive about dealing with problems.

When you begin a project, build in twice the resources – of time, money, and energy – that you think you'll need.

Don't trust your gut reactions without testing them. Confirm your instincts with facts, logic, and data.

Re-evaluate your decisions with cost-benefit analysis, giving each aspect of the decision a rating. This will help you avoid emotional attachment to any one part of the decision.

Never assume you know what others think. The best way to be sure is to ask them.

Conduct a premortem before launching a project or process. Gather stakeholders, and ask them to imagine that the project has failed. Have them write down reasons why it failed, and then brainstorm solutions.

Second-guess your decisions and those of your collaborators. Don't move ahead with your first impulse.

Ask for help if you feel yourself becoming depressed, anxious, or overwhelmed. If you don't find help, you could become a victim of pessimism bias. With such a bias, you're likely to lose confidence in yourself and may end up making harmful – even disastrous – decisions.

– which he previously could have handled easily – helped push him over the edge. He turned in his resignation letter. The organization launched an expensive year-long search for a new executive, who didn't work out well, leading many supporters to abandon the nonprofit.

The whole fiasco could have been prevented if the executive had talked to the board when he first started feeling anxious and overwhelmed. Earlier cost-cutting would have resulted in less drastic layoffs. The executive would have had more mental resources and would have handled the blow to staff morale from these cuts. He would have continued to lead the organization, which would have continued to do well.

I share this story with the hope that you as a nonprofit leader will take it to heart and influence your key stakeholders, especially those without professional nonprofit training,

CONTINUED ON PAGE 26

to be more aware of and attentive to mental health. The executive director I coached is one of many terrific senior nonprofit staff pushed to and past their breaking point by members of their boards.

In an increasingly disrupted and uncertain age, which will only breed more stress and anxiety, we can't afford to lose talented nonprofit leaders by failing to pay attention to the dangers of mental health challenges. Nonprofit leaders – staff and volunteer alike – need to encourage and model transparency around mental wellness and to provide training in how to spot and support colleagues in times of

“Board members are rarely trained to recognize mental problems.”

Action Steps to Address the Hidden Dangers

Nonprofit leaders can take active steps to address mental health challenges among nonprofit senior staff:

1. Enhance awareness. Be sure your organizational culture permits discussion of mental health issues. Whether you're an executive director, board chair, or other nonprofit leader, it's up to you to address hidden mental health challenges and bring them to light.

2. Train nonprofit board members and staff on supporting those with mental health challenges. By holding such trainings, you accomplish three goals:

Signal that mental health is a topic of concern and that it's acceptable to talk about it.

Invite people who attend the training to share their current or past experiences of mental health challenges, helping them feel less lonely and enabling them to relate to each other.

Provide specific, concrete steps people can take to support anyone with mental health challenges.

3. Make sure the organization finances professional support for mental health challenges, just as you do for physical health. That might mean that you do the following:

Ensure mental health coverage as part of your employee health plan.

Offer an employee assistance provider (EAP) program that includes mental health assistance for employees.

Make it acceptable for employees to take a mental health sick day, just as they would take a sick day for physical health challenges.

trouble. We all need to treat mental health as seriously as we do physical health.

Is there a conversation you could have today about mental health with someone in your organization? It's time to take the first step and move this issue into the open. 

Known as the disaster-avoidance expert, Dr. Gleb Tsipursky (gleb@disasteravoidanceexperts.com, glebtsipursky.com) empowers nonprofit leaders to avoid disasters by addressing threats, maximizing opportunities, and resolving personnel problems. A best-selling author of numerous books, he is best known for Never Go With Your Gut (careerpress.com), The Blindspots Between Us (newharbinger.com), and The Truth Seeker's Handbook (intentionalinsights.org).

Footnotes

¹“Key Substance Use and Mental Health Indicators in the United States,” Center for Behavioral Health Statistics and Quality.

²Jayne Barnard, “Narcissism, Over-optimism, Fear, Anger, and Depression: The Interior Lives of Corporate Leaders,” *U. Cin. L. Rev.*, 77: 405.

³Tetyana Pudrovska & Amelia Karraker, “Gender, Job Authority, and Depression,” *Journal of Health and Social Behavior*, 55.4: 424-441.

⁴Sabine Geurts et al., “Burnout and Intention to Leave among Mental Health-care Professionals,” *Journal of Social and Clinical Psychology*, 17.3: 341-362.

⁵David Hecht, “The Neural Basis of Optimism and Pessimism,” *Experimental Neurobiology* 22.3: 173-199.

⁶Susan J. Wenzel et al., “Biases in Affective Forecasting and Recall in Individuals with Depression and Anxiety Symptoms,” *Personality and Social Psychology Bulletin*, 38.7: 895-906.

Create a Culture that Supports Mental Health

Supporting mental wellness will lead to better communication, greater productivity, and much happier, more motivated people throughout your organization. Assure such an atmosphere with articles such as these from NonprofitWorld.org:

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

Is Your Coworker a Jerk, or Does He Need a Doctor? (Vol. 36, No. 2)

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

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

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

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

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

Are You Training the Right Things? (Vol. 40, No. 2)

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



Take a Stakeholder-Centric Approach to Research

The road to results? Engage your stakeholders.

By Aurelia Aceves Hogan

Research and analysis aimed at refining your organization's strategy or programs is a key ingredient for success. Understanding your nonprofit's core issues – and learning about the communities you serve – will provide the clarity to ensure that your organization's mission and programs match reality.

Yet when many nonprofits embark on research, they conduct it in a siloed way. Only a handful of people – often leadership or a small group of consultants with a top-down view of the organization – carry out the work. Research and analysis can thus miss the mark, representing a narrow perspective of the work your team does.

In contrast, you can take a stakeholder-centric approach. Who better to drive this work and provide new knowledge than the people who live and work your nonprofit's mission every day? These stakeholders are your constituents and community, your board, and your staff.

Stakeholder-centric research for internal assessments and for program evaluations can evoke honesty about problems your nonprofit is experiencing. It's also a great opportunity for emotional engagement that can help stakeholders feel a part

of the organization and advance your nonprofit's reliability and transparency. This, in turn, can fuel everything from increased funding to improved program participation to better employee retention.

Below, find six strategies for taking a stakeholder-centric approach to research and analysis.

1. Start with a strong foundation. Before launching any new research project, it's crucial to map out your goals and identify who your stakeholders are. Otherwise, you'll be navigating in the dark.

Ask and answer questions like these:

What is the vision and intended outcome of this research?

What kind of impact do we want it to have?

These questions will help you understand whether your research is internally-focused or whether the goal is to refine a program.

CONTINUED ON PAGE 28

of what's working and what's not. Use a set of metrics to keep you accountable. Metrics might include, for instance: **the number** of stakeholders you interview **the volume and depth of data** you collect from them **how the data can be applied** in practice.

Along the way, understand that these metrics aren't static. They can and should be adjusted to meet your needs. For example, if you're getting an over- or under-representation from a specific stakeholder group, you may need to adjust your research or related metrics.

5. Take analysis seriously. Once the research is complete, the process is only half done. Now it's time to analyze the data you've amassed from your stakeholders. Start by cleaning and filtering the data – that is, removing any extraneous responses and categorizing conversations and their themes. From there, you can produce a first-draft analysis report and then scrutinize that analysis for any gaps. If there *are* gaps, your team should try to fill them in with additional research. Where gaps can't be addressed, be transparent. Explain why the gap persists and what its implications are for your findings.

As this analysis is taking place, make sure your stakeholders are involved. A core group should be instrumental in reviewing that first draft, identifying gaps, and planning further research.

6. Dispel myths. As you research and analyze alongside your stakeholders, don't fall prey to myths about the process. For example, many nonprofits may feel they can't burden their stakeholders by seeking information from them, especially stakeholders who are volunteers. In reality, engaging volunteers in this process can build trust and community. Your stakeholders want to be included – not excluded – in how your organization operates and evolves.

Research and analysis are essential to building a sustainable nonprofit – and stakeholder involvement is essential to research and analysis. By taking a stakeholder-centric approach, you'll hear directly from your most important audiences, in turn developing research and analysis that's rich, equitable, and easy to act on. 

Aurelia Aceves Hogan is a director at Public Works Partners, LLC (publicworkspartners.com), a WBE/DBE/SBE certified planning and consulting firm specializing in multi-stakeholder initiatives and building strong connections across the nonprofit, government, and private sectors.

“Let your stakeholders expound on their feelings about your organization.”

In the Next Issue

This article is the second in a series by authors from Public Works (publicworkspartners.com). See the third article in the series – “Is Agile Assessment Right for Your Organization?” – coming up in our next issue.



Measure Your Impact

For more on measurements, metrics, and stakeholder involvement, take a look at these articles at NonprofitWorld.org:

Four Steps to Evaluation Success (Vol. 23, No. 2)

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

Using Your Outcome Measurement System (Vol. 18, No. 1)

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

Performance-Based Management Builds Funding & Support (Vol. 23, No. 6)

Something Is Missing: The First Step in Evaluation (Vol. 29, No. 6)

Is Your Organization Achieving Optimal Performance? (Vol. 29, No. 3)

Using a Balanced Scorecard (Vol. 27, No. 3)

Don't Overlook the Stakeholder Survey – a Key Tool for Success (Vol. 40, No. 3)

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

Key Performance Indicators: Nonprofits Need Them, Too (Vol. 31, No. 2)

Two Simple but Important Metrics Your Nonprofit Needs to Measure (Vol. 37, No. 4)

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

Are You Using the Power of Assessments and Audits? (Vol. 14, No. 1)

Nearly Half of Job Seekers Are Using ChatGPT to Apply

Despite launching less than a year ago, ChatGPT has already made major waves across many sectors, including recruitment and HR. ChatGPT (Chat Generative Pre-trained Transformer), a type of artificial intelligence developed by OpenAI, creates documents that appear human-generated. A survey by ResumeBuilder (resumebuilder.com) finds:

- **46% of job seekers** are using ChatGPT to write their resumes and cover letters.
- **7 in 10 who have used ChatGPT** report a higher response rate from potential employers.
- **78% got an interview** when using application materials written by ChatGPT.
- **59% were hired** after applying for a job using materials written by ChatGPT.
- **11% were denied a job** when the interviewer discovered they used ChatGPT.
- **58% weren't denied a job** even though the interviewer was aware they used ChatGPT.
- **88% are likely** to continue using ChatGPT to write their job application materials in the future.
- **3 in 4 say that materials written by ChatGPT** are high quality and require no (or very little) editing.

“Job seekers who use ChatGPT for their cover letters and/or resumes are really no different than those going to a resume writing service or using readily available templates and online tools. Hiring managers know this when reviewing these documents and can likely tell if they were written by ChatGPT,” says Stacie Haller, career advisor at ResumeBuilder.

“I don't see this changing the hiring process as much as it becoming a tool for job seekers to be able to produce more effective collateral in their search,” she continues. “The most important part of the hiring process is still the interviews, skills and personality testing, and references. It's not new that job seekers aren't writing their own resumes, this is just using a new technology.”

Embracing Resilience

What makes a nonprofit organization successful? Nonprofits often use the same criteria as their business counterparts: short-term profit and growth. Yet nonprofits are public-serving, not driven by profit motives, and the vision for many nonprofits isn't to increase the need for their services but, rather, to reduce that need. Indeed, many advocacy and research nonprofits strive for a day they're no longer needed at all.

Nonprofits must plan for long-term sustainability because their visions take time to achieve. This means strategizing to get through tough times and to grow when appropriate – allowing organizations to be what the sector is noted for: resilience. That's what *Resilience and the Management of Nonprofit Organizations* (e-elgar.com) is about.

The book's authors, Dennis Young and Elizabeth Searing, consider resilience in terms of finances, innovation, technology, people, and networks. They explain how to prepare for crises by building “slack” (or reserves) in each of these areas. Slack

can provide the resources needed to recover once a crisis passes and to expand services in flush times.

Being resilient demands breaking free of the shackles imposed by an austerity mindset while acknowledging that challenges will occur. Strategizing for resilience allows an organization to scan the environment to find the opportunities arising from constant change.

—reviewed by Terrence Fernsler

Three Common Mistakes Leaders Make with Underperformers

Most organizations have at least one underperformer. Helping such employees become more productive can be tricky. Dana Brownlee, founder of Professionalism Matters (professionalismmatters.com), points to three errors we tend to make with underperforming staff:

1. Not investigating the underlying cause. Too often we jump to conclusions and don't analyze the root cause of poor performance. It's easier to focus on what's wrong than figure out why. Take time to determine whether the poor performance results from a lack of awareness, ability, or motivation, Brownlee advises.

2. Not matching the solution to the cause. Just as a doctor prescribes different medication depending on the ailment, you must customize your response and proposed solution to the specific cause. If employees have motivation problems, sending them to training is like putting a band-aid on a broken arm. Ensure that the corrective action addresses the real cause of the problem.

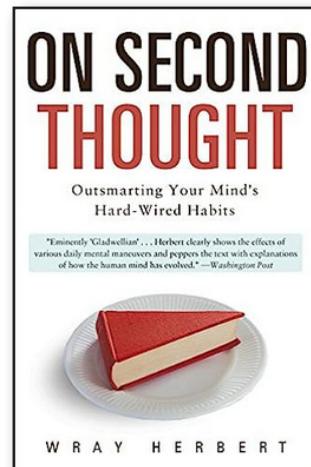
3. Not testing awareness. We sometimes miss the importance of determining employees' awareness of their deficiencies. If they think they're doing fine, the first course of action isn't correcting the problem but, instead, helping them see where and how they need to improve.

Your Secret Mind

You may not realize it, but you use heuristics for hundreds of decisions you make every day. Heuristics are hard-wired mental shortcuts that everyone uses in routine decision-making. These cognitive tools are crucial to navigating life's myriad choices. But they're imperfect and often irrational, as Wray Herbert explains in *On Second Thought* (crownpublishing.com). He describes dozens of experiments that show how our minds can betray us when we rely on heuristics.

People who understand heuristics can manipulate you if you're not careful. Once you're aware, however, you can guard against falling into these traps. Consider these common heuristics:

The Familiarity Heuristic. When we're accustomed to something, we tend to trust it. This heuristic can make us



“Not to decide is, actually, to decide.”

accept all kinds of risky situations as unthreatening. The familiarity heuristic is a factor, for instance, in many avalanche deaths. Skiers are more likely to die in avalanches in territory they know well. They assume it's safe because it's always been safe before. The same thing happens when you trust people or processes simply because you're comfortable with them. The bookkeeper who's been with you for 10 years, for example, can embezzle money because you drop your guard. To avoid such ambushes, look at all aspects of your organization with fresh eyes on occasion. Just because people or processes have been around a long time doesn't mean they're still giving you optimal results.

The Momentum Heuristic. Once you've embarked on a plan, momentum is likely to keep you on that path even if better options come along. Likewise, you're apt to see an outcome as inevitable once it has occurred. This heuristic can make it difficult to learn from mistakes and take responsibility for your actions.

The Decoy Heuristic. Imagine you're trying to decide between two options, and then a third, obviously inferior, choice is added (the decoy). You'll feel a pull toward choosing one of the first two options – the one that's most like the decoy. Although it would be better to search for more opportunities before making a decision, your brain hijacks your rationality, tugging you toward a choice you wouldn't have made otherwise. Psychologists believe that trade-offs are so unpleasant because they always involve loss. “We hate and fear having to pick,” Herbert explains. “The decoy lets us off the hook, emotionally, by letting us make an easier choice.”

The Default Heuristic. You use this mental shortcut whenever you do nothing rather than act. Studying options and making a choice is far more wearying than sticking with the status quo. The problem is that traditional rules and policies don't always make sense. Not to decide is, actually, to decide. The point, as with all these heuristics, is to understand what your automatic brain wants to do, then either affirm it or decide to try something new.

Many things – stress, distractions, multitasking, lack of sleep – can compromise decision-making and make it harder to overrule the automatic processing of heuristics. See, for example, these articles at [NonprofitWorld.org](https://www.nonprofitworld.org):

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

Smart & Fast Are Not Enough (Vol. 29, No. 1)

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

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

What Are the Most Annoying Buzzwords in the Workplace?

A new study by Preply (preply.com) asked people about their perceptions of office jargon – and found an upswelling of annoyance. Key findings:

“**Circle back**” is the most irritating phrase, followed by “work hard, play hard,” and “boots on the ground.”

“**New normal**” is the most annoying new buzzword of the year.

“**FYI**” is the most used buzzword.

The phrase “**like a family**” is the most irksome for job seekers to see from potential employers, followed by “fast-paced environment.” While 43% say it makes no difference in how they perceive the prospective employer, 55% view buzzwords in job postings negatively. Only 2% say it makes the job appealing, and nobody says jargon makes them eager to apply.

“**Vibe**” was voted the most annoying word Gen Zers bring to the office. Far more than any other word, Gen Zers like to say “vibe” in the workplace (and probably outside of it as well). If you have young people in your office, also get ready to hear these words in 2023: “no cap,” “bet,” “lit,” and “basic.” Just be careful. Gen Z buzzwords are sometimes used ironically. So if a Gen Z coworker suggests that your office party is “going to be lit,” it might not be a good thing.

Older employees like to use metaphors in their work jargon (military, sports, and more). When working with boomers, you'll no doubt hear their #1 office expression: “ducks in a row.” If you've spent any time with people of that age, you're already likely familiar with other boomer favorites, including “reinvent the wheel,” “think outside the box,” and “wear many hats.”

Beware of using jargon, especially when talking with people of different generations. It muddies the water, inhibits understanding, and gets on people's nerves. If you want people to understand you, speak to them in clear, direct language. You'll all be much better off. 

63% Would Choose Better Work-Life Balance Over Better Pay

According to a survey of over 4,000 professionals by FlexJobs (flexjobs.com), 63% of respondents say that, if given the option, they would choose better work-life balance over better pay. Additional findings:

87% say that having a remote or hybrid job has improved (or would improve) their work-life balance.

84% say that having a remote or hybrid job makes them (or would make them) a happier person in general.

65% say their ideal work arrangement is 100% remote work, and 32% want a hybrid workplace.

57% say that if they weren't allowed to keep working remotely in their current position, they would look for a new job.

45% estimate they save at least \$5,000 a year by working remotely, and 29% say they save at least \$2,600 a year (from not eating out, no gas, dry cleaning, etc.) 

Supporting Our Communities

Two books by Emerald Publishing (emeraldgroupublishing.com), *Community Participation and Civic Engagement in the Digital Era* and *Action Learning and Action Research*, focus on community sustainability. While they're academically oriented, both books have practical applications for nonprofit organizations.

In *Community Participation and Civic Engagement in the Digital Era*, Mudit Kumar Singh notes that local participation is vital in sustaining community development, especially in rural areas, which tend to be economically challenged while resource rich. He examines how digital communication can be used for community engagement and explores the future of digital work.

Each chapter of *Action Learning and Action Research* is written by different authors, specialists in their fields. The book's editors define "action learning and research" as "observing lived experiences and working in groups to resolve real-life problems, learning what works and what doesn't." Such an approach is a welcome contrast to the insularity of much current research.

Both books emphasize the importance of flexibility and cooperation in solving global challenges. Their authors provide insight on how nonprofits can help communities meet interconnected problems so they can bring transformative change. 

—reviewed by Terrence Fernsler

Beyond the Briefs

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

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

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

Twelve Heuristics that Will Raise Your EQ (Vol. 26, No. 4)

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

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

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

Who Will Be Your Best Employee? (Vol. 42, No. 3)

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

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

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

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

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

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

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