Board Leadership During (and After) the Pandemic
Adapting and Stepping Up

Presented by Andy Robinson for the Hartford Foundation for Public Giving

Welcome!
I’m Andy…
Author, trainer, consultant, and survivor of many nonprofit crises
Getting started…

What do you want to learn today?
Why is this topic important to you?

Outcomes for today’s workshop

Participants will learn…

• How the board can better support staff
• Tools for prioritizing and protecting programs
• Strategic questions to explore now
• Financial questions you need to answer
• Building the board’s fundraising skills
1. Be compassionate
How can volunteer leaders best support staff and other board members?

Breakouts
What is your board doing now to support the staff? What else might they do?
Report-backs
What did you discuss?
What did you learn?
Possible next steps?

2. To identify and protect core programs, clarify your niche
   • What are your unique assets?
   • Compared to peers, where are you strongest?
MacMillan Matrix
Created by Ian MacMillan
of the Wharton School,
University of Pennsylvania

Four criteria:

1. Alignment with mission and abilities
2. Program attractiveness: “easy” or “difficult”
3. Competitive position compared to others
4. Alternative coverage – who else is doing overlapping work?

MacMillan Matrix for grassroots groups

<table>
<thead>
<tr>
<th>Good Fit with Mission and Abilities</th>
<th>Strong Competitive Position</th>
<th>Weak Competitive Position</th>
<th>Poor Fit with Mission and Abilities</th>
</tr>
</thead>
<tbody>
<tr>
<td>HIGH Program Attractiveness: “Easy” Program</td>
<td>Alternative Coverage High</td>
<td>Alternative Coverage Low</td>
<td>1. Affirm this program and negotiate functions with other organizations.</td>
</tr>
<tr>
<td>LOW Program Attractiveness: “Difficult” Program</td>
<td>Alternative Coverage High</td>
<td>Alternative Coverage Low</td>
<td>2. Grow in order to provide this service to the movement.</td>
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<tr>
<td></td>
<td></td>
<td></td>
<td>3. Give this away quickly.</td>
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<td></td>
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<td></td>
<td>4. Decide with other organizations who should do this.</td>
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<td></td>
<td>5. Collaborate to share the load or help find resources.</td>
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<td></td>
<td>6. “Soul of the Organization” – find support for this or limit its scope.</td>
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<td></td>
<td></td>
<td></td>
<td>7. Give this to other organizations supportively.</td>
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<td></td>
<td></td>
<td></td>
<td>8. Collaborate to share the load or give it away.</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>9. Give this away quickly.</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>10. Give this away systematically.</td>
</tr>
</tbody>
</table>
Use this tool to figure out when...

- Your organization should lead
- It’s best to support other groups
- You might be stronger working together!

Consider using this matrix for a joint exercise with potential partners
3. Ask (difficult!) strategic questions

- How has the pandemic exposed the underlying social issues that affect your community?
- What are the implications for your mission, programs, and partnerships?

Breakouts

How has the pandemic changed your thinking about your organization’s work?
About the work of your board members?
Report-backs
What did you discuss?
What did you learn?
Possible next steps?

4. Understand (and improve) your business model
Four questions board members should ask – and be able to answer…
1. What are your current sources of income – and what would the best mix of income?

2. Which programs or activities are costs centers and which are profit centers?
Matrix Map

As presented in:

NONPROFIT SUSTAINABILITY
Making Strategic Decisions for Financial Viability

High Mission Impact

Low Fundability or Profitability

High Fundability or Profitability

Low Mission Impact
Is your *board* a profit center ... or a cost center?

Calculate the cost of having a board, compared to the revenue generated by your board – if you dare…

3. Does your organization have a reserve fund? How much money is in it, and under what circumstance can it be used?
4. What is your organization’s biggest financial risk? How will you mitigate that risk?

5. Be fearless about fundraising

- Everyone gives as much as they can – right now
- Fiduciary responsibility = Improving how you spend and raise money
- Engage! More fundraisers = more income
To raise money successfully, you need four things

- A strong case for giving
- Prospective donors to ask
- People to do the asking
- Systems to track data, money, donor recognition, etc.

Engaging your board in fundraising

Most nonprofits can strengthen all these areas, but here’s the biggest challenge

- A strong case for giving
- Prospective donors to ask
- Not enough askers
- Systems to track data, money, donor recognition, etc.
However, not everyone will be an asker, so we have to redefine fundraising to better engage our volunteers –

**It’s not just about asking for money**

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Cycle of fundraising

Ask ➔ Identify prospects ➔ Educate & cultivate ➔ Thank & recognize ➔ Involve more deeply
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Time allocation

- Identify
- Involve
- Ask
- Thank
- Retain

Inclusive Involvement

1. Focus on quality calls to new member lists.
2. Utilize known to work with new members.
3. Focus on bringing new members.
4. Follow up with potential contributors.
5. Remember that there are no secrets.

Identify Prospects

1. What is your typical prospect?
2. What is the most effective way to contact them?
3. What is the best time to contact them?
4. What is the best way to engage them?

The Ask

1. What is the most effective way to ask?
2. What is the best time to ask?
3. What is the best way to engage them?
4. What is the best way to follow up?
Train your board: **Cycle of fundraising**

- Brainstorm and fill in the worksheet
- OK to use sample (North Lakeland Discovery Center) for inspiration
Train your board:

Design a board fundraising menu

- Using the following sample, brainstorm your own version
- Use as a check-in at board meetings: “What have we each accomplished from the menu?”

Menu of 2017

Fundraising Opportunities

Board Member: ____________________ Date: _________

This is an "all you can eat" menu!
We ask you to commit to as many items as you like — but at least one per category.

Appetizers
- Provide names of donor prospects
- Personalize letters to current and prospective donors
- Attend and mingle with donors at a House Party
- Introduce development staff to members of the business community

Entrees
- Host a House Party
- Arrange a site tour for some of your friends, conducted by the Executive Director
- Accompany the Executive Director or other staff on donor visits
- Organize a 2-hour volunteer party with friends or colleagues
- Recruit new board members with fundraising experience and connections
- Recruit Wintergreens or Farm Party sponsors
- Volunteer to help at Wintergreens or the Farm Party

Desserts
- Collect copies of other organizations' solicitations and annual reports for GCH staff
- Make thank you calls to donors
- Promote and attend one of our annual events and mingle with donors
Sample board fundraising agreement

Name ____________________________ Date _______________

To support the mission of our organization, I agree to take on the following:

1. My gift: $___________ Payment completed by (date) ________________
Terms of payment (check, credit card, installments, etc.) ___________________
_________________________________________________________________

2. Prospects. I will provide names and contact information for ______ prospects by
   (date) ________. Even if I am unable to follow up with all of these people personally, I
   will still add names to the list for mailings, event invitations, etc.

Sample board fundraising agreement (continued)

3. My fundraising support tasks (taken from our menu):
   a. Activity ______________________________________________________
      Date(s) ________________
      Projected revenue (if applicable) $_______
      Help / support needed from staff or board _______________________  
      __________________________________________________________________

   b. Activity ______________________________________________________
      Date(s) ________________
      Projected revenue (if applicable) $_______
      Help / support needed from staff or board _______________________  
      __________________________________________________________________

   c. Activity ______________________________________________________
      Date(s) ________________
      Projected revenue (if applicable) $_______
      Help / support needed from staff or board _______________________  
      __________________________________________________________________

__________________________________________  __________________________
Signature of board member/volunteer Signature of board chair
How can we measure nonprofit resilience?

- Depth of partnerships and mutual aid
- Diversity of revenue; adequate reserve fund
- Contingency budget and contingency plan
- Leadership succession plan
- Culture of abundance and adaptation

What would you add to the “resilience list?”
How will you implement what you learned today?
Andy’s latest book!
Available from
www.emersonandchurch.com

Carry on and stay in touch!
www.andyrobinsononline.com
www.trainyourboard.com