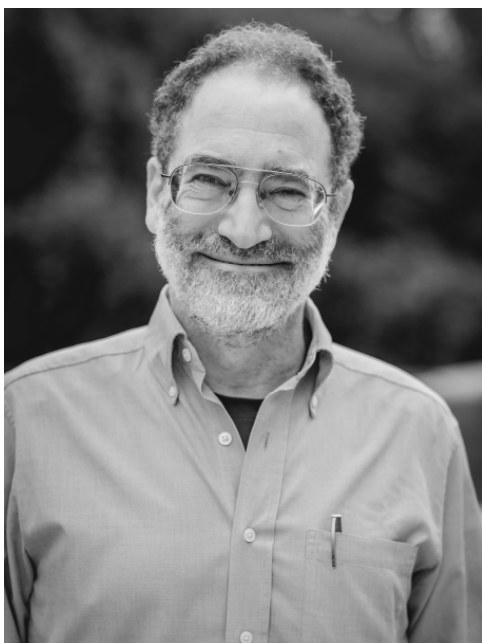




Board Leadership During (and After) the Pandemic

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?

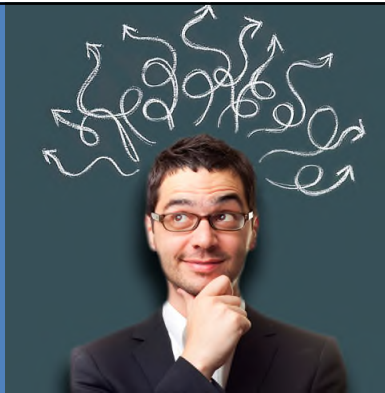
What did you learn?

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

MacMillan Matrix rephrased for grassroots organizations

Adapted by the Institute for Conservation Leadership in “Managing in Hard Times,” www.icl.org. Used with permission.

		HIGH PROGRAM ATTRACTIVENESS: “Easy” Program		LOW PROGRAM ATTRACTIVENESS “Difficult” Program	
		Alternative Coverage High	Alternative Coverage Low	Alternative Coverage High	Alternative Coverage Low
GOOD FIT WITH MISSION AND ABILITIES	Strong Competitive Position	1. Affirm this program and negotiate functions with other organizations.	2. Grow in order to provide this service to the movement.	5. Collaborate to share the load or help fund resources.	6. “Soul of the Organization” – find support for this or limit its scope.
	Weak Competitive Position	3. Give this away quickly.	4. Decide with other organizations who should do this.	7. Give this to other organizations supportively.	8. Collaborate to share the load or give it away.
POOR FIT WITH MISSION AND ABILITIES		9. Give this away quickly.		10. Give this away systematically.	



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?

A cartoon character of a spark plug with a smiling face, large eyes, and orange gloves and shoes. It has a red and yellow starburst above its head, indicating it is lit or active. The character is standing with its arms outstretched.

**4. Understand (and improve)
your business model**

Four questions board members should
ask – and be able to answer...



A photograph of a man in a dark suit, white shirt, and red tie, looking thoughtful with his hand on his head. A large red question mark is positioned to his right.

1. What are your current sources of income – and what would the **best** mix of income?

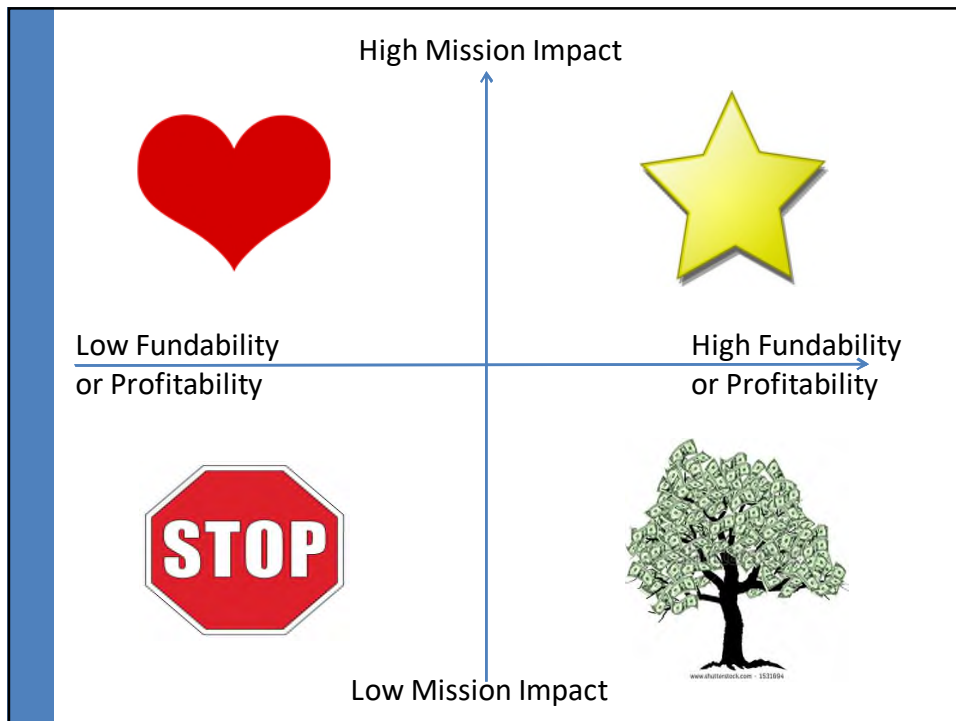
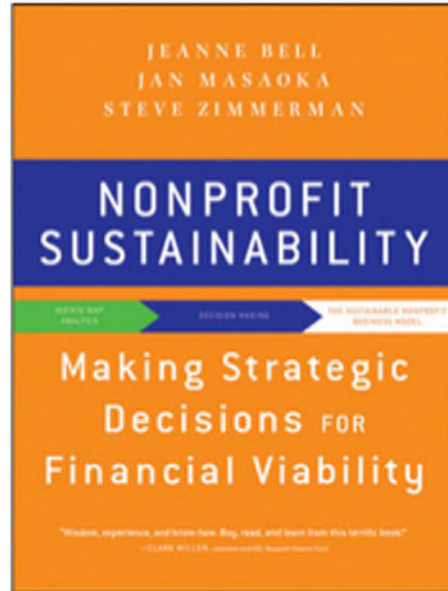


2. Which programs or activities are costs centers and which are profit centers?



Matrix Map

As presented in:



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

Engaging your board in fundraising

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.



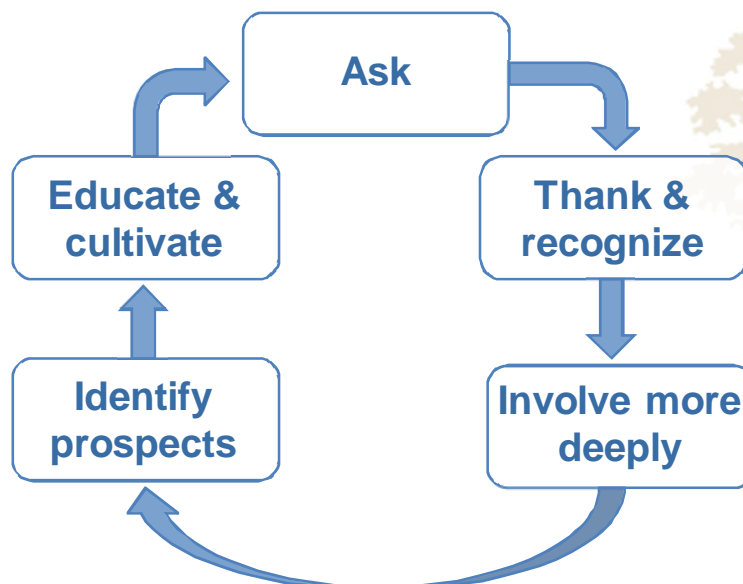
Most nonprofits can strengthen all these areas, but here's the biggest challenge

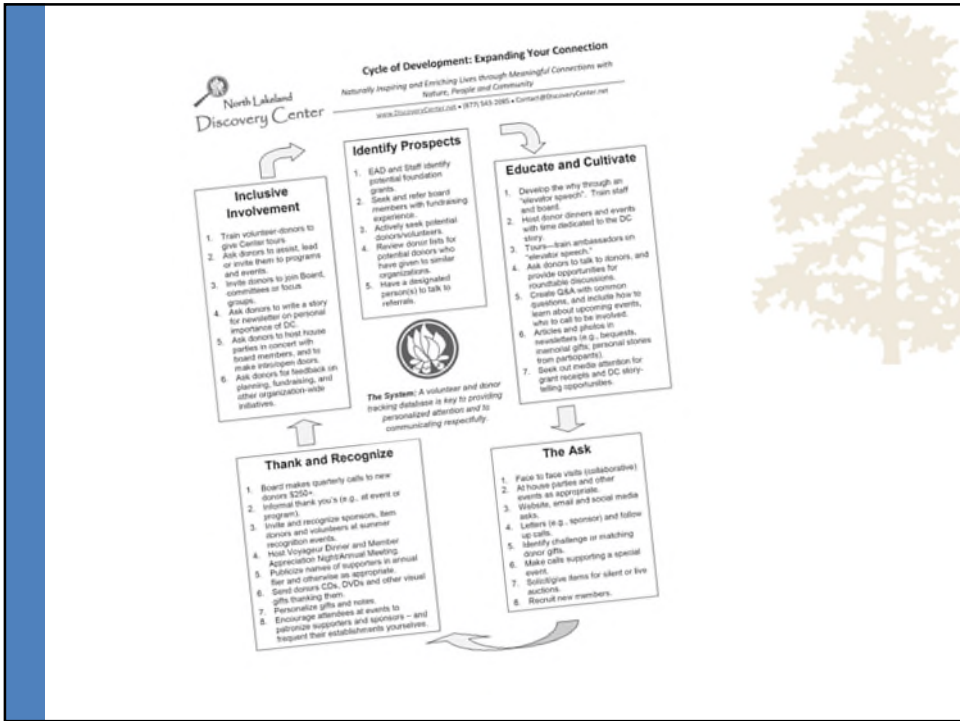
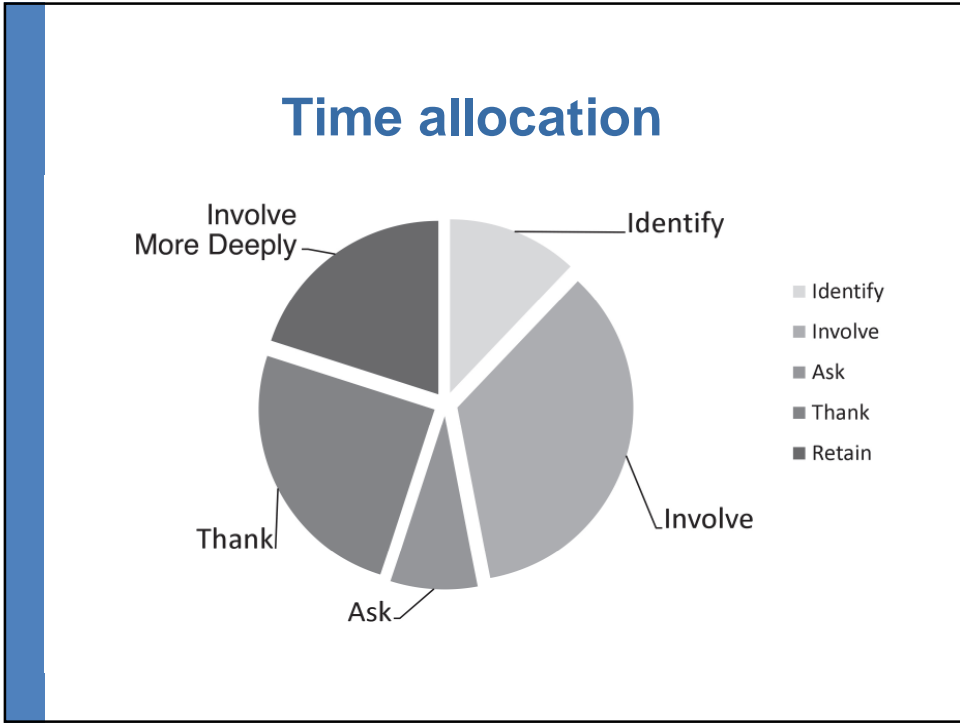
- √ A strong case for giving
- √ Prospective donors to ask
- !!! Not enough askers**
- √ Systems to track data, money, donor recognition, etc.

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**

Cycle of fundraising

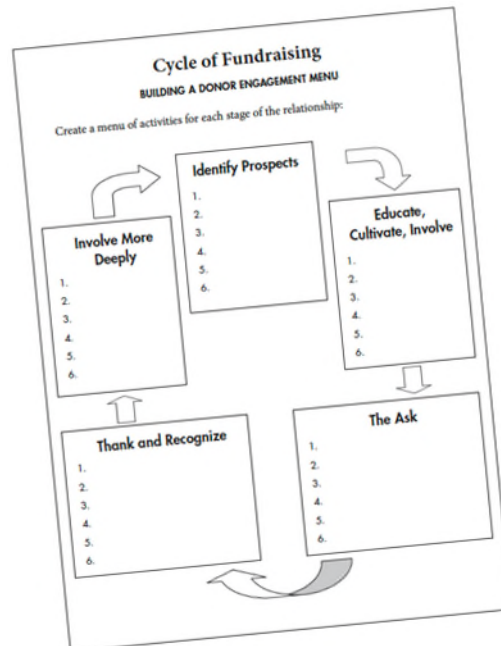






Train your board: **Cycle of fundraising**

- 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

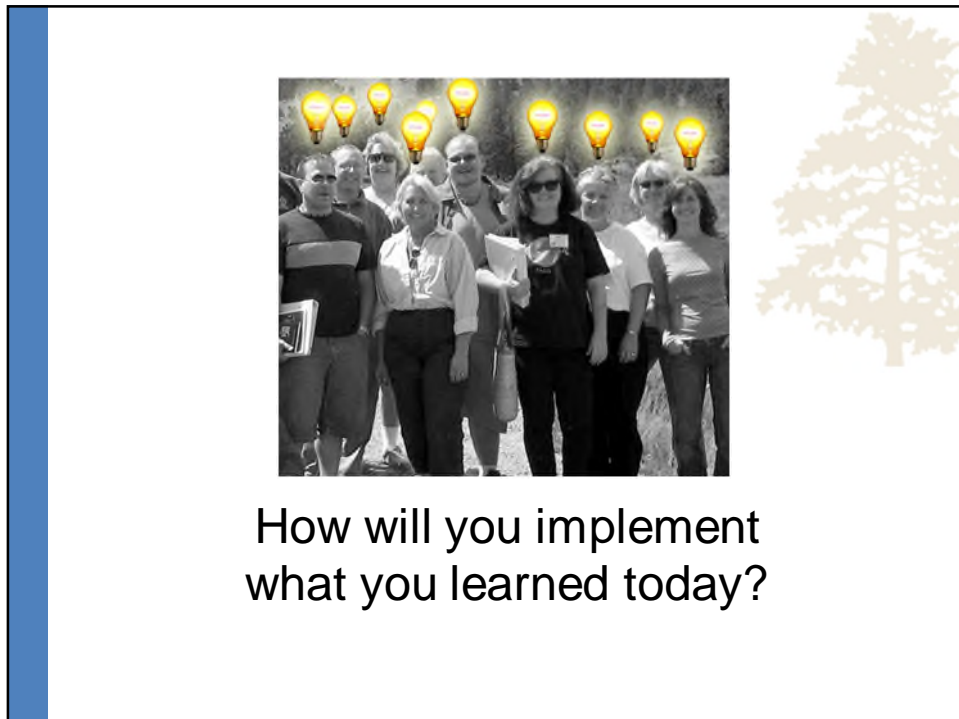


How can we measure nonprofit resilience?

- 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?”



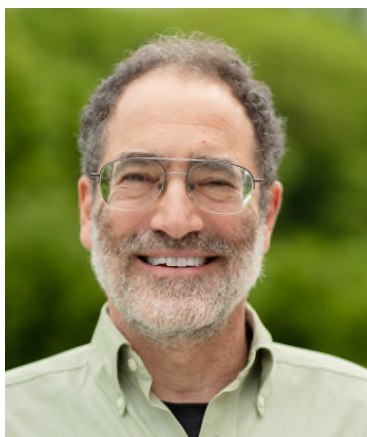
How will you implement what you learned today?



Andy's latest book!

Available from

www.emersonandchurch.com



Carry on and stay in touch!

www.andyrobinsononline.com

www.trainyourboard.com