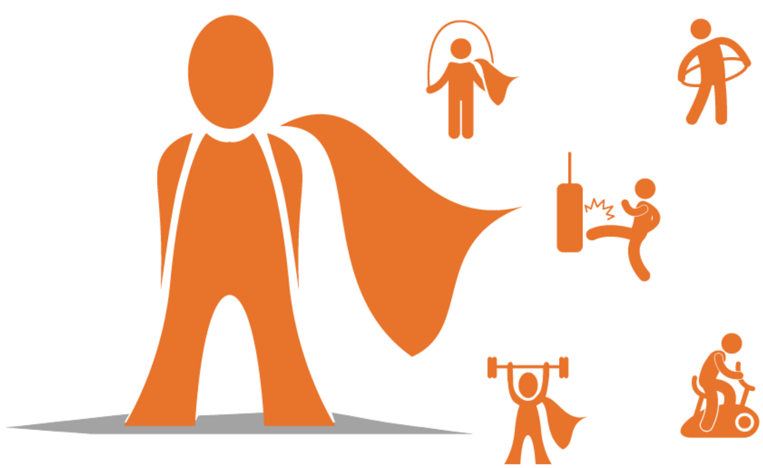
nonprofit LEADERSHIP LAB

Because the World is Counting on Us.

5 Exercises for a Thriving and Resilient Nonprofit



Hi, I'm Joan Garry.

Congrats on receiving this *Bonus Bundle* that accompanies my recent webinar.

In the webinar, I offered 5 steps you can take right now and I hope you found them helpful.

I want to make sure you fully implement these 5 steps, and so in this Bonus Bundle I provide for you exercises that will help to bring each step to life more quickly and with greater impact. As an aside, these resources are exactly the kind of content you will find inside my Nonprofit Leadership Lab. If you haven't already joined, you can request an invitation here.

I'm a big champion for leaders of nonprofits – especially the small and mighty nonprofits that sometimes take over our lives – and I have played every position on the nonprofit field – Executive Director, board member, donor, volunteer...

Now I help nonprofits thrive as an executive coach, strategic advisor, a best-selling author, a popular blogger and podcaster, and a highly sought after public speaker and media spokesperson.

And I have a whole lot to teach nonprofit leaders.

Look, nonprofits are messy. It's true even for the best nonprofit organizations out there. Not enough money... Too many cooks... An abundance of passion...

Often I write about what nonprofits are doing wrong and how to fix it. After all, "nonprofits are messy" is more than just the name of my podcast — it's my mantra. And my mission is to help nonprofits clean up the mess.

Joan Garry

Exercise 1
ARE YOU TOUGH ENOUGH?

Of course you are tough. You have raised your hand to help change the world in ways large and small. You stand as a fierce advocate for your clients, lobby with eloquence for causes that matter. So we know you can do it.

But here's what we also know. You have serious pleaser tendencies. It comes from the optimism that drew you to the work. What that means is that you have a tough time saying no.

The key to this whole pleaser thing is to keep it in check. To be clear-headed about when you really need to say no and when it's not so black and white.

Do you know how many times I have seen a nonprofit leader say yes to something that's had a negative impact on the ability of that organization to do the very best work it can do?

Short answer: too often.

So this exercise will offer you four scenarios and ways in which nonprofit leaders often respond. I am guessing you might see yourself in some of the response options.

After each scenario, I'll offer my two cents that I hope will help you exercise the muscles you need to be tough when it counts.

Ready?

SCENARIO #1

Your new board chair feels ill informed and has no time to meet. She asks for a 2 - 3 page weekly report. You are concerned this will take too much time.

What Do You Do?

1. You don't have time and want to just say no. But she's new and needs to get up to speed. You justify it that way and also figure she'll only want it for a few weeks, so you say yes. And something else that you know is more important doesn't get done. Or you stay late to do it.

2. You say you don't have time and push hard for a 30 min weekly meeting instead.

3. You give thought to what your new board chair really needs. She is saying 2 - 3 pages, but you could probably give her enough information in one page. You recognize her need to know and honor her request by agreeing to send her a weekly summary noting that the length may vary.

4. You spend an hour complaining to anyone who will listen, 30 minutes more than it would have taken you to spit out the two pager.

Joan's Two Cents

Look closely at option 3. What's really important is that you have in fact honored her request to be informed. While she has jumped right to a specific tactic that she thinks is the right one, she has insufficient context. She is new and not really clear about all that you have on your plate.

Complaining about the plate gets you nowhere. And saying a flat out no will piss her off.

The goal in navigating this situation is to get at the root. What is she trying to solve for? What will make her feel competent? How can she articulate what's happening at the organization with solid soundbites?

Your shorter version could end up being the basis for a standing agenda for that regular meeting you really need. And don't forget to open your email response by letting her know that you gave a lot of thought to a tool that would be valuable for both of you as partners.

SCENARIO #2

Your poor performing staff member runs your monthly finance reports. For 4 months in a row, there have been big mistakes. Your treasurer caught them, not you. Treasurer is now totally furious. At you! You knew a year ago that this person needed to go but her spouse lost her job and is still unemployed. You've been redoing the financials yourself but ran out of time during this recent crisis. Will you give your staff member one more chance? Or more than one?

What Do You Do?

1. You spend 30 minutes explaining the personal situation of the staff member and assure your treasurer it won't happen again. You commit to prioritizing the review of the

financials carefully every single month. You're irritated and prove the point yet again that if you want something done right you have to do it yourself.

2. You put your staff member on a performance improvement plan but it's pretty vague. In 90 days it will not be crystal clear she has to be terminated. Throughout the ninety days, you hold court for the staffer and listen to how bad things are at her house. You're empathetic and a good listener.

3. You take a look at her last three annual performance reviews and see that you went really easy on her. You have insufficient documentation to terminate her. And besides, she has responsibilities that you can't give to anybody else on your current team.

4. Her past performance reviews along with emails in a file are all you need. You ask the treasurer for a note documenting the problem. You meet with the treasurer and brainstorm how to fill the gap - possibly your treasurer knows someone who can do the basics as a volunteer? Or you look for a freelance CPA on www.upwork.com? Create a plan, get the treasurer on board, and then sit with the employee to terminate her. Be as generous as you are able with some additional pay or benefits.

Joan's Two Cents

There's a lot to break down here. First your performance reviews must be honest. You will need them for just such situations and can avoid any hint of litigation. You have to be tough in the NARRATIVE of a review.

Next, if the performance issue has reached the board, you need to partner with a board member to brainstorm the solution. In this case, your treasurer will have your back as you think through the gap and how to fill it. The treasurer may offer to lean in more actively. And the board will see you as someone who is being proactive about a staff problem.

SCENARIO #3

Your biggest donor is on your board and you are told by your development manager that the board member has been flirting with her. She is unequivocal and uncomfortable. You know the board member should be asked to step off the board. And you also know he's going to stop donating. You need to go to the board chair, and the two of you need to ask him to resign.

What Do You Do?

1. Your board chair is not on board (no pun intended). “These things happen.” And as an E.D., you can’t ask a board member to step down. You create a workaround so that the devo manager has as little interaction as possible.

2. You have a great board chair who totally gets it, and the two of you meet with the board member and request his resignation. He is furious, claims the development manager flirted with him, and leaves mad and takes his money with him.

3. You empathize like crazy with your staff member but avoid the whole thing like the plague.

Joan’s Two Cents

We all know what this story is really about, right? It’s about having the right board chair.

I don’t know how I can yell louder about the importance of building and cultivating leadership on your board. Without a great chair who works with you to ask this board member to step down, there are problems in every single direction. Big ones. This board member needs to go. The development manager needs to be affirmed.

And if your board member takes his donation with him, he is the kind of donor who will cross other lines. His donation is not really tied to his passion for the mission. Time to focus more energy on cultivating donors whose passion for your work is palpable.

SCENARIO #4

It’s budget time. The board is anxious and risk averse and asks you to cut expenses by 15% across the board. How likely are you to be able to clearly explain the programmatic impact of that cut? Or to show them the list of investments you want to make that didn’t make it into the budget.

What Do You Do?

1. The treasurer does not back up your claim that cutting expenses would hurt programs. Without support, you simply agree to go back and cut the 15%.

2. They hear you and decide not to require the expense cut but rather they ask you to increase major donor revenue. You are uncomfortable doing that without securing some kind of board commitment to be actively engaged in raising this new amount. They hear you. They add the revenue and put 50% of the new revenue budgeted into a 'Board Fundraising' category. You are skeptical but do see that they are taking some responsibility.

3. You work behind the scenes prior to the board meeting - with the treasurer and with your chair of development and your board chair. You'll need a one-pager that shows them how you balanced the budget. It should include a list of items you really need to maximize the impact of your work and it should include something that makes the three of them say, "OH! We really need to do that and if we don't, we won't help as many people, we'll miss important visibility, and it will impact revenue." What you are looking for are champions for being more aggressive about raising money. Then when the budget cut conversation comes up, you and these champions can pull out the one-pager and pass it around. "This is what we have already cut to get our budget balanced and as you'll see each and every item matters." Have your champions walk through it so it's clear that cuts have already been made. Get the group thinking about increasing revenue and you just might get them thinking differently.

<u>Joan's Two Cents</u>

You've caught on. In each of these four scenarios, the long answer is the right one. Sorry - can't help it. Saying "no" and being "tough" with those in power demands an investment of time, a big dollop of diplomacy, and your feet firmly planted on the mission.

You are tough. I know this about you. If you can build stronger muscles and maybe a little thicker skin :) you can use all the tools in your tool box to be tougher. And you might think it counts most when it involves your clients and the work you do. But it always counts.

Hope this helps you how to think about how to practice saying no in a way that will please the "pleaser" in you.

Exercise 2

TEACH YOUR BOARD TO EMBRACE CREATIVITY

During times of crisis and uncertainty, you throw 'business as usual' out the window. You try new things, you think outside the box. And you know what you learn? That 'business as usual' was not all it was cracked up to be. And the new stuff worked, didn't it? I bet at least some of it did.

So what does that mean for what happens when we get to the 'other side' of a crisis?

First off, eliminate this phrase from your vocabulary: "I'm looking forward to having things go back to normal."

Instead, here's your new phrase.

"I learned about the value of trying new things and it made so much possible I would not have imagined."

There's only one problem. You have figured this out, but your board probably hasn't. They are undoubtedly impressed with all you've done, but boards tend to like what is predictable. For folks who are changing the world, board members are change resistant and risk averse.

So here's a sample script with talking points for your Executive Director Report for an upcoming board meeting. It is designed to help you get your board to understand that the single best way to thrive, grow and scale is to pilot new ideas and try new things.

WHAT CHALLENGING TIMES MADE POSSIBLE

Begin with a case study of something you did differently.

- Collaborated with others in the community to help more people
- Engaged more volunteers in a new way - perhaps from home?
- Tried some outside-the-box virtual conference, retreat, or salon that introduced more people to your work
- More active and creative social media
- Maybe you got some press coverage
- Perhaps you came up with a plan to get board members checking in on donors

Talk about how these new strategies increased your impact or reach. Bring the work to life by bringing in a staff member, volunteer, or client who can speak to the impact directly and from the heart. Together, share the lessons you learned that you are hell bent on taking into the future.

THE CASE FOR PILOTS

Ideally, send your board members a pre-read before this session. I highly recommend the work of Kathleen Kelly Janus, either her full book, Social Startup Success or send them an excerpt.

This can prime the pump for your board and help them see that great nonprofits set up pilots on a smaller scale with agreed upon success metrics. Success means scale.

Board members want to be associated with the best organizations. This is what the best organizations do.

LET'S GIVE IT A GO SHALL WE?

If you are going to make the case, have a plan. Don't make it grand. Keep it manageable.

Start with a pilot that builds on the lessons you learned from the crisis. Encourage the board to stay really close on it so they get comfortable with the idea of risk. Consider a small task force. Get to it. Try it. Illustrate proof of concept and you and your board will be excited at the success and the possibility to scale.

That's how you build the momentum you need to create a culture of experimentation and creativity.

Exercise 3

A RECIPE FOR “BOARD BRAGGING”

During times of uncertainty, it can be hard for your board to imagine “imposing” on people to tell them about the important work of your organization.

Given everything going on, people don’t want to hear about our mission right now!

They have it ALL WRONG. It is in the toughest of times that people are most desperate to hear stories of hope and inspiration - to learn how your organization is working to help those in need, to solve a societal problem. It is exactly during this time - uncertainty - that board members should be most vocal. Stories of your heroic efforts are the best antidote to chaos and uncertainty.

So how do we get board members out there bragging? Here are four steps you can follow right away. And all can be done virtually. These steps will fuel and energize your board and build their capacity to become five star storytellers and ambassadors for your mission.

IT’S TIME FOR A MEA CULPA

During your next Executive Director Report at your next board meeting, tell your board you’ve had a revelation.

That you think you spend too much time nagging them rather than feeding them.

That board members are, at their best, organizational ambassadors and that it is your job to make sure they have what they need to be the best ambassadors they can be. And it all starts with the ability to tell a good story about the work.

Commit to a series of activities that will inform and enrich board members to become good and enthusiastic storytellers about the work of your organization. Tell them that now more than ever, the organization needs its leaders out there bragging about the work.

HOW TO BUILD A POSSE OF BRAGGERS

1. Enrich them. Send them resources. Could be an article from Harvard Business Review or a podcast from Donald Miller. Don is amazing at this – an internationally acclaimed master of storytelling. Recently, he led an invaluable expert seminar for our members

inside the Nonprofit Leadership Lab that taught us all kinds of ways a nonprofit can invite the public into their story. So valuable!

The Nonprofit Leadership Lab is my membership community for nonprofit leaders who want to build thriving nonprofits. It's designed specifically for leaders of smaller nonprofits and you're welcome to join us here.

2. Invite board members to a storytelling 'salon.' Call it "30 minutes, 30 goosebumps." Not a board meeting. 30 minutes.

Bring a client, a funder, or just you as the E.D. Your job is to feed the board stories. Ignite their "mission pilot light" and show them how the storytelling thing is done. Reference the resources I mentioned above.

3. Practice at every board meeting. 15 minutes. Ask for 1 or 2 volunteers to practice the elevator pitch and share it with the group.

a. I'm Joan and I'm proud to be a board member of X
b. Our organization is remarkable because....
c. Can I tell you a little story? (You've got 3 minutes.)
d. That's just one of many stories I can tell you. Would you like to know more?

After the storyteller is finished, the facilitator asks folks to respond to two simple non judgmental prompts:

- What I liked a lot was ____________.
- I wish that _____________.

That's it. And just keep practicing. It gets easier. I do this with clients all the time. It's fun and board members feel so damned good that they can really tell a story that INVITES folks to come closer to the work.

One last thing. This exercise goes hand in hand with Exercise 4 below about stewardship. How great it is to nurture donors in your organization and feel highly competent to speak to the work with a fantastic story!

Exercise 4

A BOARD STEWARDSHIP PROGRAM

We talk about fundraising all the time and we say the right things. It's all about relationships not transactions. We are all quite clear that nurturing the relationships we have with our donors is essential. We know that our donor retention numbers are not where they should be (assuming we track them like we should).

Well guess what? People are not traveling. They are not going out to eat very much. They are home. But there's only so much Netflix they can binge. If there was a time when you would be likely to be able to reach someone at home, it would be now.

Combine that with a board that is in exactly the same situation. And these board members really want to be of help. They may be feeling queasy about asking for money, but they care deeply about your mission and know how tough things are for you right now.

So let's take advantage of the opportunity the challenge has created. It's time for a board stewardship program.

What Is It?

Each board member is asked to manage a portfolio of donors, volunteers, and staff. Not a big list. I'd say 10 at the most. Could be 5.

The board member reaches out personally to each person in the portfolio at least quarterly. They do not ask for funds. It's simply a check-in See how the individual is managing through the uncertainty. Talk a bit about the organization and its remarkable work during these times. And always, give thanks for being a part of the family of support.

That's it. And that's a lot, because it creates high touch contacts between the leaders of your organization and the people closest to it.

Why Do It?

As a donor, I give when I feel close to the organization. The president of my temple called our home in late March. I saw his name on my phone and immediately said to my wife, "Do we owe membership dues?" She rolled her eyes at me as she so often does. Nope, she said.

I picked up the phone and guess what? Josh just wanted to check in and see how we were doing. That's it. We chatted for 10 minutes and yes he asked if we had been attending virtual services but that was not the centerpiece of the call.

It was lovely. And when the Rabbi sat with us to ask us for a High Holiday appeal gift, I remembered that call. Josh drew us closer.

Here's another critical reason. When we are on the other side of this crisis, we will need our organizations' family to feel that sense of community, of closeness. Because it will be this family that will be central to rebuilding and growing.

The "How"

a. Start with 5 - 7 people per board member. Go through your database and identify 7 times the number of board members. Not just your biggest donors. Maybe a staff member that's on serious overdrive. Maybe a brand new volunteer. Mix it up.

b. Create an Excel spreadsheet for each board member (if you all use Google Sheets, this is the way to go since you can update in real time).

c. The Executive Director meets with the chair of the development committee and reviews the lists and brainstorms talking points for a script guide. Buy-in from the chair is key.

d. Next, have a meeting with the whole committee to energize them about rolling this out. Get their ideas about scripts. Make sure the list feels right. And if I am on your board, you don't have to assign me the people I know. It's better that I speak with new folks - more touch points with more board members is better!

e. Send out some version of this resource to the board ahead of the next board meeting along with each board member's spreadsheet.

f. Allow for 30 minutes at the board meeting for the Devo chair to roll it out. I myself love a good role play - E.D. and Devo chair give it a go and show folks how easy it is.

g. Be sure to be clear about what board members should do after each call, how they should update you and the spreadsheet.

h. Development committee serves a peer accountability role, checking in between board members to see how calls are going (and ensure they are getting made).

i. At every board meeting, the E.D. needs to talk about this program, appreciate the board members and add a new story to the stewardship inventory. Heck, how about a video of a client that gets sent to all board members that they in turn send to their 5-7 folks? “The crisis has made our work more necessary than ever. Thought you’d like to see what you help to make possible!”

One last thing. They may not be asking these 5 - 7 people for money but don’t they become the IDEAL people to secure the renewal or upgrade at the end of the year? Let’s not tell the board that you are training them to ask for money. Let that be our little secret.

Exercise 5

IMAGINING THE POSSIBILITY

When was the last time you had an exciting open-ended conversation about what could be possible for your work? Well, believe it or not, now is just the right time.

Can you imagine planning to climb Mount Everest, meeting regularly to plan and prepare, to raise funds for your adventure, and never once having a conversation about what you will see from the top? Or how you will feel?

We do this with our boards all the time. We take the thrill out of the work of changing the world.

Nose in the cash flow thwarts a view of the horizon. And it is that horizon view that brings people into your organization's orbit. Folks appreciate the impact you are having today, but speaking to the vision you have is what will excite them to stay with you on the journey.

What if you had a conversation with your board that came from a place of abundance rather than scarcity?

Try it.

In the next planning meeting you have with your leadership partner (chair or E.D.), put something new on the agenda. Look carefully at your last agenda and find 30 minutes of conversation that could have been part of a report or could have been handled by a small subset of your board.

a. List this agenda item as "Dreaming Big" or "Imagine the Possibilities".

b. When the agenda goes out, ask each board member to consider how they would answer the following question. Ask board members to come to the meeting having written down some of their ideas.

> "You have just received a surprise bequest of enormous magnitude. The bequest mandates that all accounts payable be brought up to date and that any substantive debts be paid. After this, the organization is left with an unrestricted $5 million. What do you do with the money? The letter from the donor encourages the organization to think boldly."

c. In a virtual setting, the board chair should call on each board member in turn and allow them to share this high level bold thinking. Perhaps one board member would be kind enough to take notes and see common threads. Let the E.D. go last, offering her own thoughts and then commenting and driving a conversation about all the different ideas. When you talk about the ideas, 1) no eye rolling and 2) no laughs under breath. In fact, dig deep into the idea – is there a powerful seed that the organization could pilot? Does it generate ideas about conversations to have with other leaders in the sector? Can an idea be a rallying cry you can use to engage folks on social media?

d. Close the conversation with a clear action or two.

e.If you don't put 10 minutes on the agenda of the next meeting to talk about the ways in which the exercise was valuable and have some legit things to say, don't bother doing the exercise. I mean it.

One last thing. I promise you there will be some treasures in an exercise like this. There will be a few good ideas you can ignite. There will be an idea that will change what you budget – perhaps you'll build a three year budget this time around.

But most importantly, you have re-energized your board.

Each of your board members joined your organization because they had a fire in their belly for the promise of your mission. But when you have meeting after meeting where scarcity is the order of the day, that flame will be extinguished.

But unshackle board members from that and as Dr. Seuss famously said, "Oh the places you will go…"

ABOUT THE NONPROFIT LEADERSHIP LAB

Nonprofit leaders – board chairs and executive directors – are heroic. The outbreak of COVID-19 has only made the demand for your work and hunger for your leadership bigger than ever.

I'd like to help you navigate this crisis.

Maybe you want to raise more money, build a 5-star board or staff, create a smart strategic plan, or attract more people to support your mission.

Or maybe you need a place to connect with others that are dealing with all the same challenges you are in these crazy days we're living in.

So please come join us in our amazing community and dive into all that the Nonprofit Leadership Lab has to offer.

As a new Lab member, you get access to an awful lot...

Click the image above for a short video message from Joan

🔥 **More than 40 educational courses.** Learn how to build the board of your dreams, increase your fundraising capacity, run effective board meetings, manage crises and transitions, get press, ask people for money, give a great event speech, write a fabulous grant proposal, and so much more.

🔥 **Time-saving resources.** Like checklists and templates. We're talking board member applications and assessments, governance checklists, ED annual evaluations, board member interview questions, new employee orientation checklist, agendas. Members also get access to more than 2-dozen "Quick Wins" which are designed to be easy to implement and get you, well, a quick win.

🔥 **Support from me.** One of my favorite things to do over my morning coffee is spend time helping our members in our online community group. I also host a monthly live Q&A where I try to answer as many member questions as I can. And check this out – we've created a browsable and searchable database that contains my answers to every single question that's been asked during a Q&A since the Lab started in 2017. Pretty neat, right?

🔥 **My team of experts.** Learn from nearly 30 different experts (and counting) including people like Beth Kanter, Donald Miller, Julia Campbell, Dr. Paul White, Rachael Gibson, Dan Portnoy, Lindsay Hoffman, Dan Osheyack, Ben Wyskida, Liz Page, Brian Saber, and others.

🔥 **Fundraising and grant writing bootcamps**. Several times each year we host intensive fundraising and grant writing bootcamps. These are optional opportunities for you to dig deep and dramatically improve your results. Our members have raised hundreds of thousands of dollars during these bootcamps and CFRE credit is sometimes available upon completion.

🔥 **Our generous and amazing community.** While new members often come for all the great content, they *stay* for the amazing community. Get the support of thousands of your nonprofit peers. Become inspired by them like I am every single day. With so many of us working remotely, having a community like this matters more than ever.

The Nonprofit Leadership Lab provides everything you need to help move your nonprofit from messy to thriving.

When you consider you get *all* of this for less than it costs for a daily cup of coffee, joining the Lab is a pretty serious no-brainer.

So come **request an invitation to the Lab today**. It's the most valuable investment you can make in your nonprofit – and in yourself.