Ewald Consulting

30 Ideas *in* 30 Pages

Essential Skills

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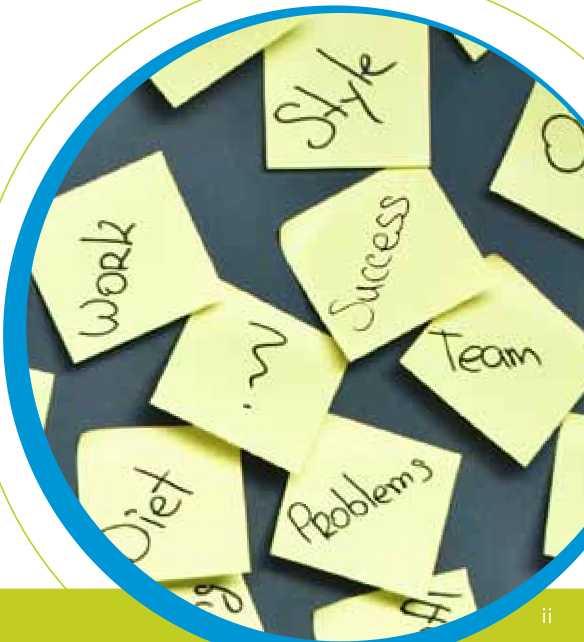

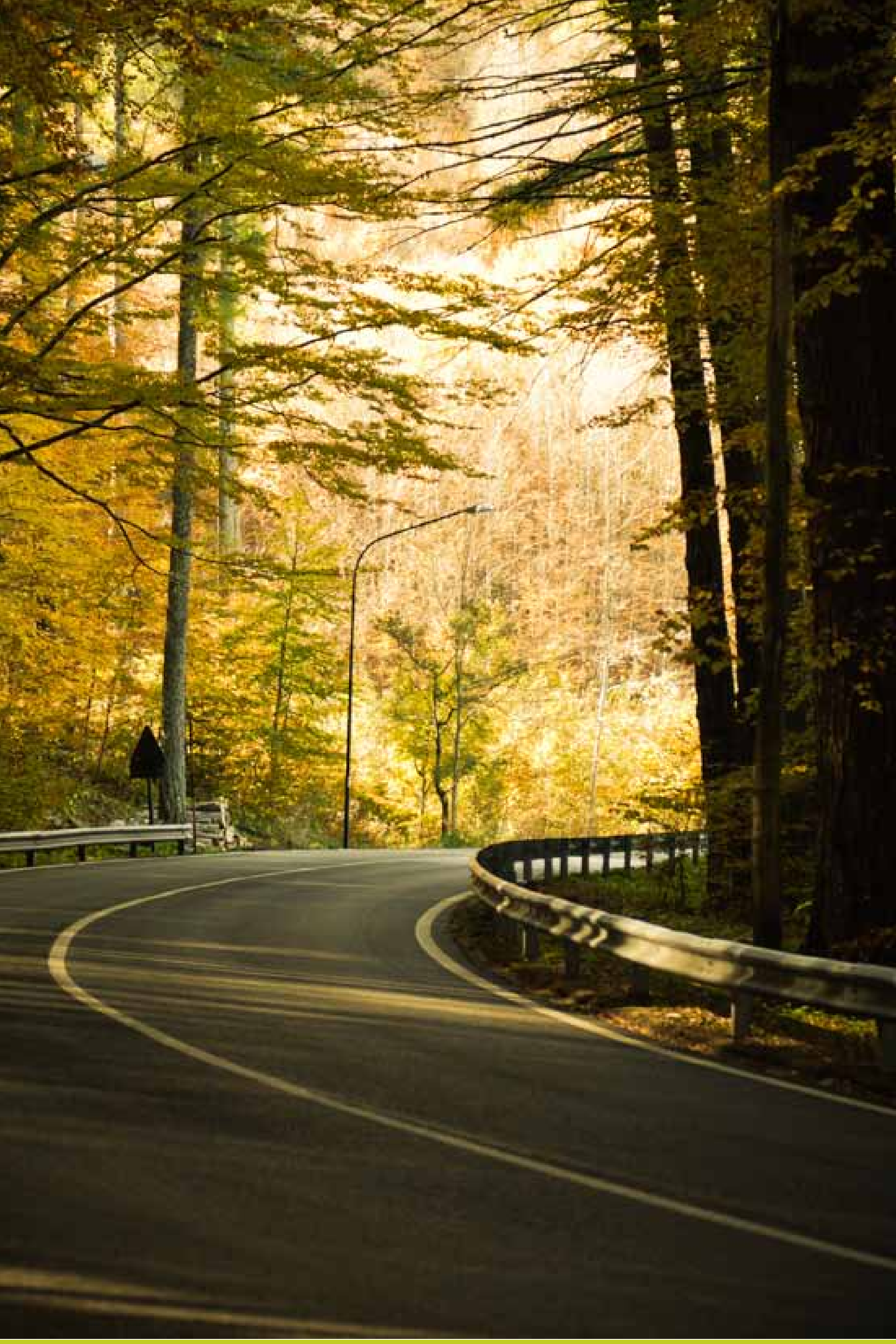

PREFACE

If you're looking for a publication on organizational improvement your options are endless. There are tomes of research and best practices to choose from. The fact is, you don't have the time to read it all. That's where this publication comes in handy.

30 Ideas in 30 Pages was developed from the Ewald Consulting seminar "30 Ideas in 30 Minutes." Like the seminar, the publication focuses on 30 successful experiences from practitioners, consultants, and volunteers spanning 40+ organizations. Each of these ideas is classified among eight categories: Governance, Strategic/Tactical Planning, Finance, Technology, Fundraising/Sponsorship, Research/Data/Evaluation, Communication, and Volunteer Engagement. Each idea includes an example of its application in one or several real-world organization(s) and the actual outcomes they achieved.

This publication is designed to spark the imagination of the reader. Rather than dive into the details of one specific topic, 30 Ideas in 30 Pages provides brief examples of successes experienced by diverse organizations as a basis for deeper thinking on any of the topics that are addressed. As a result of this approach, a broad spectrum of readers may takeaway valuable insights; whether that is the chief staff executive of a small organization or a specialist in any of the topic areas mentioned.

LEARNING OBJECTIVES

1. Get inspired by the various achievements of others to bring success to your organization.

2. Identify the management issues that are most important to you and learn how another organization dealt with them.

3. Benchmark your organization's performance in 8 critical areas of organizational management and consider practical ways to take action.

Governance

1. Use a consent agenda.

Organization #1 used to have day-long board meetings that included verbal reports from each of 21 different committees. Rather than providing input for informed decision-making, board members spent time and efforts presenting their report and diving into the weeds of items that should otherwise be addressed by committees outside of a board meeting.

Over time new directors came onto the board and saw this had become a major problem. Rather than looking forward and tackling matters that affected the community and their role in it, they were focused internally on the logistics of the organization's operations. In 2009 they began implementing use of a consent agenda. Reports were submitted in writing in advance of board meetings and board members were expected to have reviewed these materials before arriving to the meeting.

Board meetings changed immediately. Day-long meetings were shortened to a couple of hours. Topics of discussion revolved around how the organization would address economic challenges and constituent needs in a dynamic and changing marketplace. The board got their hands around the steering wheel and started driving their own path.

file number and referred to a standing committee. The chief author of the bill sometimes has a say about the committee to which his or her bill is referred. The bills will have different numbers in each body based on when they were placed in the hopper. HF indicates a *House File* and SF a *Senate File*.

The rules allow for the *introduction* of several pieces of identical legislation in the same house, called clone bills. This happens when many legislators want to be identified as authors of a particular idea. Identical bills are all referred to the same *standing committee* which then selects one bill to work on (almost always the one sponsored by a member of the majority party).

2. Keep mission, vision, and goals on the agenda.

Now that you've cleared your agenda of basic reporting functions, what's next to do but focus on future direction and opportunities that your board members previously never new existed. This is what Organization #2 found. They develop an annual plan that has objectives that cascade upwards to their goals, vision, and mission. At each board meeting they spend a few minutes (1) reviewing these high-level targets, (2) addressing what progress or changes have occurred since their last meeting, and (3) discuss what, if any, board action is required to facilitate continued progress by the implementing levels of the organization toward fulfilling the mission.

The organization has had such good results with this process that they've received an award from their National affiliate for work.

3. Establish a thoughtful process to orient and develop board members.

It takes a team to create strong board members. Senior members of the board need to provide consistent, detailed orientation and then each individual board member must take the initiative to continue his/her development throughout their term.

Organization #3 identified that a new approach to board development was critical for them to grow leadership and establish clear expectations of board members. They wanted a user-friendly orientation and development tool that busy volunteers could access when it fit their schedules – both at the start of their term as well as throughout as a reference tool. They decided to develop a series of short videos with each "episode" focusing on a different area of board development – reading financial statements, policies, and the general culture and functioning of the board; how they get things done.

The result is a more thorough orientation program for new board members and a consistent base of expected knowledge and context for board discussions. The fact that these videos are online and easily accessible means board members can view and review the information whenever they like. It also is a more personable approach than handing them a manual and saying, "read this."

4. Create specific scope for goals.

No more than 5 and 3 is even better. Group dynamics require that a board of directors keep its focus on a short list of goals that reflect and are clearly tied to the organization's mission, vision, and values.

Organization #4 is charged with the mission to be the collective voice for those who provide the continuum of chemical health services in Minnesota. For years their strategic plan was a wide triangle with a broad range of goals, each only advancing slowly each year or not at all because the staff and volunteers' energies were spread across many different areas. They lacked focus. Six years ago the board and chief staff executive made a unified decision to limit the number of goals for the organization to 5. Anything that did not fall within these five areas was not worth the highly valuable and limited staff and volunteer resources.

After a number of years the organization's leaders have remained steadfast in their dedicated to the 5-goal maximum per year. Over time Organization #4 has established itself as an authoritative resource with legislators, policy makers, and leading treatment/recovery agencies.

Group dynamics require that a board of directors keep its focus on a short list of goals that reflect and are clearly tied to the organization's mission, vision, and values.

5. Make your objectives S.M.A.R.T.

Objectives are the true measure of effective implementation of a strategic plan. If you do not spend the time to carefully craft sound objectives then you risk losing your trajectory as an organization and your stakeholders' accountability to advance the organization's mission as the board sees fit.

One group that has worked with extensively to establish SMART objectives is the Organization #5, a vehicle network that advances fuel efficiency and driver safety. Board members are used to measuring fuel efficiency and driver performance during their day jobs, so it was important to them to have outcomes they could monitor and evaluate regularly throughout the year to assess their organization's performance as well. By creating SMART objectives the staff and volunteers of this organization are able to assess progress toward their objectives throughout the year and make changes if necessary to make sure they deliver by the end of the year and, if not, they know why and adapt programs for future implementation.

The two significant outcomes this organization has seen from using and communicating SMART objectives is greater, more focused engagement by volunteers and an increase in funding from sponsors because they have a better understanding of what their investment is being put toward specifically.

6. Integrate the strategic plan into everything you do.

Too many times strategic planning means prepping for and executing a board retreat and nothing more. It means taking a snapshot of myriad data points from your stakeholders, synthesizing this data into a story you share with key decision-makers and creating the ever-coveted "Strategic Plan" document. That's it. The true power of strategic planning is the follow through. How are staff, volunteers, funders, and those in the community, made and kept aware of this strategic plan and how it will impact them? The plan needs to be communicated broadly to all stakeholders and a system needs to be in place to keep it in front of them throughout the year.

Organization #6 includes their mission and vision on every board agenda and addresses the strategic plan at every meeting. Each of their committees has relevant goals and objectives on every meeting agenda as a reminder of the overarching purpose for which they're meeting so they keep their end-game in mind on an ongoing basis. Each year the Executive Director and key staff from each department build a work plan through project management software that starts with strategic targets for the year and drills down to what needs to be done quarterly, monthly and even daily in order to make sure the strategic plan is manifest through their work.

The true power of strategic planning is the follow through.

As a result the organization has seen clearer, sustained alignment of the many parts that make up the organization. Everyone is rowing the boat in the same direction.

Strategic/Tactical Planning

7. Sound the horn for successful trends and sound it louder for negative ones.

A fundamental part of a board's fiduciary responsibility is to care for the financial wellbeing of the organization. If you're an Executive Director, your board members count on you to support them in this endeavor by providing insight into the financial and programmatic performance of the organization. You are sometimes best attuned to the subtle trends that indicate a stellar program or one that's feasibility is waning.

The newly hired Executive Director for Organization #7 decided to perform an assessment of their operations and finances. She noticed that attendance at her organization's annual fundraiser had been slightly less than the previous year, which was slightly less than the year before that. At the end of the year the organization had a slight financial loss, but the annual budget that the board approved was the same as last year because they optimistically thought revenue targets were attainable if they just put in a little more effort. Upon reviewing the 10-year performance trends of three key revenue drivers for the organization it became apparent that the same budget had been in place for all 10 years with the organization coming up just a little short each of those 10 years. As a result, the organization had burned through much of its reserves and was about to enter a financial crisis if dramatic changes weren't made.

The Executive Director made it crystal clear with the board that the trajectory of the organization was grave. The board began meeting more frequently and focused specifically on a few key items at each meeting that were directly related to the organization's financial health. With support from the board, the Executive Director was able to renegotiate vendor agreements, engage members of the community, and reposition the organization's programs to reduce expenses and reinvigorate program participation.

The results have been very good so far but the organization is not out of the woods yet. If it had not been for the Executive Director sounding the alarm and helping the board understand the severity of the trends at play, the organization might not exist today.

8, Always present a treasurer's report with financial statements.

Similar to the lesson of the previous story, it is always helpful to provide context for board members or anyone reviewing financial statements for the organization. Numbers rarely tell the whole story and a treasurer's report helps focus the board's attention and time on areas where the organization is performing significantly better or worse than budgeted.

The Treasurer for Organization #8 presents a treasurer's report every month. It is a one-page report that depicts recent financial performance, annual performance relative to the YTD budget, and a few brief bullets highlighting what board members should be attuned to.

The result is fewer questions about the financial performance of the organization as a whole and clarity about where board members should direct their attention when reviewing the financials.

9. Designate time throughout the fiscal year to plan/brainstorm toward next year's budget.

Throughout the year, informal ideas come up about new programs and services or ways to expand current activities. These ideas may be not be implemented today because this year's budget doesn't allow for them, but capture the ideas and make a point of discussing them so you can determine if they are worth incorporating as you develop next year's budget.

Organization #9 had wanted to engage more student participation in the organization but wasn't attracting students with their annual gathering. The Executive Director and a couple of board members were ruminating on this dilemma one day and came up with the idea of having a poster session at the event that allowed students a forum to present their research to leading stakeholders in the community and get their feedback. While the E.D. wasn't able to go back to the office and begin developing the idea that day, he did document it and introduced it the planning team several months later when they began discussions around the event and its budget for the coming year. The planning team wound up liking the idea and it's now become a core piece of their annual program.

Finding time to think creatively is important, especially around a topic like budgeting that is rarely a favorite. Documenting, discussing, and developing ideas during the year positions you to be well prepared when you begin budget planning. This way good ideas aren't lost even if they aren't implemented immediately.

Fundraising/Sponsorship

10. Make online giving easy.

According to the US Dept. of Interior, 80% of philanthropic funds come from individual donations. Make it easy for individuals to contribute to your organization online by providing easy-to-find opportunities.

Organization #10 has always accepted individual contributions but to contribute online was difficult – requiring a number of clicks to even find how to pay. The organization revamped its website and now features a Call to Action in the center of the homepage that says "Support Your Community – Give Now." When you click on that button there are three specific endowments that contributors are able to support, each targeting a different program or service area of the organization.

By clarifying the opportunity to give and making it easily accessible the organization has been able to increase donations, communicate opportunities to request online contributions and easily guide donors back to their website.

80% of philanthropic funds come from individual donations

11. Have donors tell your stories for you through their testimonials.

Testimonials from donors, however brief, add legitimacy to your cause and prove that other people – people your prospective donor may relate to – have found your organization worthy of their support.

As staff for a nonprofit I served as a tradeshow booth representative at a large conference a number of years ago. I was joined by a long-time contributor and the two of us engaged in conversations with conference attendees. I could visibly see the connection that she made with people as she relayed her story of the organization and why she's given her time and financial resources to be a part of it.

Prospective donors are much less circumspect of those who already give to your organization. Leverage that connection to open doors.

12. Make an emotional connection.

Always keep in mind that donor agencies and individuals aren't supporting your organization, they're supporting your beneficiaries. Convey the need of your beneficiary community through their own words, pictures and story.

A great example I see is in annual reports. The annual report of an Organization #12 does a great job telling the story of the children being served in poverty stricken communities and how the holistic care the organization and its partners provide helps transform lives. Each beneficiary's story is unique and helps each donor create an equality unique bond to the organization that brings them together.

If your donors can connect emotionally with those you serve they'll be more committed to the organization and its success.

13. Communicate to donors the desired outcome for their contribution.

If you can clearly draw the line between “contribution” and a “measurable impact in the community,” your donors will be eager to give year after year.

Organization #13 is one of several neighborhood organizations in south Minneapolis but it is the only one in the region that has an individual giving program. Each year its leaders identify a specific issue that has the community fired up and then rally volunteers to conduct a phone-a-thon calling on individual donors to help support this specific cause. Last year’s issue was the frequency of the local newsletter publication. Everyone in the neighborhood was familiar with the newsletter and they loved to read it. By asking individuals to donate in order to keep the newsletter in print they were able to raise enough funds to print the newsletter for the full year.

Communicate your donor’s contribution as a way to get their desired ends and you’ll get strong results.

Communications

14. Capture attention quickly.

When there is a message you want to convey, get your listeners' or readers' attention quickly. Communicate your message succinctly like a newspaper headline. Why should they care?

Subject lines of emails are a classic example. You have ten words or fewer to tell someone exactly why they should click and read more. Email subjects like "Weekly Update" or "November E-News" or, even worse, just the name of your organization, aren't going to get opened. Organization #14 serves as a hub for information on international nonprofit governance and they send an email almost every other day. Only in developing this publication did I realize I haven't opened a single email from Organization #14 in as far back as my deleted files have record. And I'm not alone.

People are busy as ever now and their attention is being drawn in a million directions. Let them know why they should care about you and make it snappy.

15. Keep your brand and voice consistent.

Whether you are communicating via email, postcard, Youtube video, or a special event make sure you project your organization's image consistently.

Organization #15 has a broad array of media platforms that it utilizes to communicate with an equally broad array of stakeholders. Whether it's through Twitter, Youtube, its hardcopy publications or in-person trainings, the organization's brand and voice are made present and consistent.

Don't mistake consistent branding with consistent messaging. You can customize your message for different audiences but you must be consistent with the way you communicate various messages or you risk being misconstrued as disingenuous and confusing – two characteristics that clearly turn away your constituents.

16. Engage subject-matter experts.

We can all improve how we communicate what we do and the way we serve the community. The best way to make sure your message resonates with your target audience is get their input first. Have someone from the beneficiary, or donor community – or whatever group is your target audience – review your message. Better yet, have them help you craft it. Odds are they will come up with language or a way of positioning the message that will help others in the target audience to connect.

Organization #16 leverages subject matter experts in a variety of ways. They have members of their organization develop content for their newsletter, website, and social media; and develop course materials for their training seminars. The information they generate as practitioners in training and development is relevant to the organization's members and more effectively communicates that the organization understands their needs.

17. Define your story.

For some organizations, earned media is a powerful method for building awareness with the general public. However, a special event or announcement of a change in your organization's leadership are not examples of a "story" that media sources are going to pick up on. You need to define your story in a way that will answer the question for most in the general public, which is "Why should I care?"

Organization #17 advocates for protection of lakes from invasive plant species like milfoil. Because boating, swimming and enjoyment of lakes is not limited to lakeshore property, the organization developed messaging to communicate the dangers of invasive species to native plants, animals and even people. By clearly defining and communicating their story's relevance to the general public and media outlets, Organization #17 was able to get headline exposure for their cause.

18. Talk to those who care.

Organization #17 also conducts grassroots lobbying and for those efforts its leaders focus communication to lakefront residents for whom the issue of water quality is particularly poignant. For this audience the organization speaks directly to the impact milfoil and invasive species have on their property.

For many organizations, communicating a message to the general public just doesn't make sense. It's better to communicate a focused message to engage your niche audience rather than generalize your message so much that nobody listens.

Technology

19. Use a project management sustem to keep operational items on track.

There are plenty of software tools designed to help keep your organization and projects on track. Pick the one that fits your needs and use it consistently. Project management software provides a clear illustration of your operations from the mission and strategy down to the daily tasks and tactics. It operationalizes your strategic plan in a way that can be communicated to board members, funders and staff.

Organization #19 spent the last year with half of its staff putting their activities into an online project management tool to test it out. The staff team gained efficiency and clarity in their project execution; so much so that they have the rest of the staff team beginning to use it now so all staff activity will be managed through the application. By planning the entire year's work of activities through the project management software the organization was able to free up staff time and focus on getting the work accomplished.

One caveat about project management software is that you shouldn't overuse it. That's to say, don't over-engineer and micro-manage your activities down to the minute of details but try to get core functions covered.

20. Keep your inbox empty.

When it comes to email there's only one way to keep on top of things. If Outlook is like your house then your inbox is like your kitchen counter – it's tough to get much cooking done when you have piles of junk mail, birthday cards, and bills stacked up. Your productivity will go up if you keep your inbox empty.

If something in your inbox would take fewer than 15 minutes to address, deal with it and delete it. If it takes more research, use your fancy new project management software to schedule a time to work on it – then delete the email. If the email has vital information in it, copy that to a document that's on file or assign it to a folder within Outlook; either way, get it out of your inbox.

This is what I do. This is what I advise my colleagues to do. Some of us actually do it and the world is better off for it.

21. Put your social media horses before the cart.

I don't know about you, but I feel like I get social media advice at least three times a day. Years ago when the social media buzz began I had clients coming to me saying, "We need Twitter, Youtube, the Facebook page, Pinterest, LinkedIn and you name it." The problem they ran into is that they created a profile for their organization on one or all of these platforms but had no plan on how to manage, market, or add value to it. Even with a good launch and maintenance plan, if your target audience doesn't use one of these platforms your best bet is to focus attention where they're at.

One organization that has experimented well with social media is the Organization #21. They recruited a volunteer social media team to start a Facebook group and a LinkedIn Group to engage members and build their global online community. Their LinkedIn Group took off very well but their Facebook Group didn't seem to be gaining traction. They decided to focus on building out their LinkedIn Group resources but, rather than totally abandoning their Facebook real estate they decided to use it as a forwarding page to direct more traffic to LinkedIn.

The key is, get volunteers committed to lead your social media participation, then develop a strategy, build a base-level of activity, THEN launch to the public. Social media is meant to be a party of shared content, not a one-person endeavor.

22. Implement technology with purpose and people in mind.

State employees are generally readily accessible and committed to helping. A phone call or email is all that is needed to obtain information and/or inform them of concerns. Many of them have been in their positions for a long time and are some of the most knowledgeable people at the Capitol on specific topics.

Research, Data, and Evaluaion

23. Benchmark with similarly focused organizations.

It's healthy for an organization to assess its overall performance relative to a set of both internal and external benchmarks. Internal benchmarks are relatively easy; you just define metrics that measure against your current and past performance.

Defining external benchmarks can be challenging though. If you're lucky enough to have other chapters or branch offices like the American Red Cross then you can perform an apples-to-apples comparison with their performance. If there aren't any organizations that are identical to yours your best approach is to find an organization that serves a similar target population.

No matter what the organization, you can make benchmark your financial performance against any organization by going to www.guidestar.org and comparing Form 990s. This helps you assess overhead expenses, income and expenses around special events, website design, and key revenue generators.

24. Segment your market.

No matter what population you intend to serve there are certainly segments of the group that are more engaged than others. You probably have a feel for what common attributes there are among the segment of the population that's actively participating in your programs, so what commonalities exist among those who aren't involved? What do they want that you're not providing and what do they want that nobody is providing? Should you try to engage them or are their specific needs outside of your service niche?

Organization #24 used to have the word "Midwest" in its name. The group assessed what services it provided to nonprofits and what organizations were actively participating. They identified they had very few organizations participating from outside of the Twin Cities and virtually no participation from outside of Minnesota. While there was a need in that region they knew they didn't have the resources to fulfill it and seemed deceptive to suggest that the organization was "Midwest" in scope. As a result the board decided to rebrand the organization with a Minnesota-specific identity. The organization has been on a growing trajectory since its inception. Identifying and focusing in on its market segment has helped this organization continue its high-growth trajectory.

25. Use the feedback you collect

When it comes to collecting input from program participants make sure you're asking questions that will lead to actionable outcomes.

Organization #25 wanted to survey its stakeholder community about what programs were most useful. They asked a variety of volunteers to help develop the survey and they wound up with more than 40 questions to include. Knowing that response rates drop off precipitously in surveys with more than 10 questions, they scrutinized every one by asking, "What action will we take based on the feedback we get from this question?" As a result they were able to get their survey down to the top 15 things they really wanted to know in order to make improvements to their operations.

Asking for feedback helps make participants feel like their opinion counts, but if the information isn't useful then it's a waste of everyone's time.

26. Collect meaningful data and communicate it back.

I can't tell you how many times I've participated in a survey and never heard back from the company or organization on what they've done with the results.

Organization #26 collects feedback from participants in their annual convention. They ask questions that (A) are consistent each year so they can compare results over time (B) impact their program development so they're always refining to their community's interests and (C) provide fodder for marketing the organization as a whole, like "100% of participants in this year's program say they would recommend it someone else," or "99% of attendees said they plan to come back again next year."

Making feedback public makes surveying a two-way communication vehicle with your participants and increases the likelihood that they'll continue to provide feedback in the future.

27. Leverage data to connect people.

As you collect participant data throughout the year you get a better idea of your participants' demographics. Use this data to either create focused groups of people with similar demographics or to get a cross-sectional group that represents the spectrum of your community. This can be helpful if you're customizing a program for a particular niche within the community or if you want to get feedback on how a program change would be perceived by various groups within the community.

Organization #27 collected information about how long participants have been involved in the field. It defined four sub-communities that tended to coalesce informally based on age, years of experience, and the types of programs they identified with. The organization decided to create a forum for each of these sub-communities to gather in person and online. It's still early in the roll out of this approach but there's already enthusiasm among the leadership and volunteers that helping connect people this way will make the organization more vibrant as a whole.

Volunteer Engagement

28. Ask.

Getting volunteers for your organization should not be a struggle. The number one response, by far, that people give to the question, "Why don't you volunteer for the organization?" is, "Nobody has ever asked me to." As an aside, this is also the number one response to the question about why someone doesn't donate to an organization too.

Ask people to volunteer, ask them one-to-one either in person or over the phone, and ask them to do something specific; ideally with a job description. Organization #28 converted its board nominating committee to a member engagement committee. All year long these individuals are assessing the volunteer needs of the organization and reaching out to members of the community who they think would be the best fit. If a committee needs volunteers they go to this group and get help recruiting. In that way the volunteers are always receiving the personal invitation to get involved.

29. Make it purposeful.

The first question in my mind when someone asks me to volunteer is, "For what reason?" What is the purpose behind this volunteer need? A key to making each volunteer feel that sense of purpose is articulating how the need ties to the organization's goals and mission.

Organization #29 conducts annual planning to identify performance objectives for the year and assign them to volunteer groups. Each of the volunteer groups then decides how to carry out this plan and what volunteer opportunities would be helpful to bring it to fruition. When the organization solicits new volunteers to be involved they can describe what the need is and how this volunteer service is advancing the direction of the organization to serve communities.

Volunteering with a greater purpose increases the likelihood that the person you're talking to is going to agree and that they'll do good work.

30. Thank them for their contribution.

Once your volunteers are involved and contributing to your organization don't forget to thank them for it. Whether you're inviting someone to serve on your board of directors or write content for your social media site, make sure they know their contribution is appreciated. Provide them feedback too.

Organization #30 has thousands of volunteers that pack freeze-dried meals for crisis situations around the world. They end each volunteer experience by thanking the volunteer team and calculating the number of meals they've packed and the number of people they've helped to feed through their work. It's no wonder this organization boasts such a strong volunteer retention rate.

Thank your volunteers in a way that's meaningful, at every level of contribution.

ABOUT EWALD CONSULTING

The contents of this publication are also available through an interactive workshop entitled, “30 Ideas in 30 Minutes.” For more information about this session or any of the ideas shared in this publication, contact Paul Hanscom at paulh@ewald.com or (651) 290-6274.

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This book is also available online at www.ewald.com.