

THE NONPROFIT RESCUE WORKBOOK

by Joseph J. Morrison, Jr.

The helping hand
you need to save
your nonprofit
from going under

A STEP-BY-STEP GUIDE

Publishing Information

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INTRODUCTION



When you're drowning, you don't say 'I would be incredibly pleased if someone would have the foresight to notice me drowning and come and help me,' you just scream.

- John Lennon

Introduction

Understanding Why You Are Sinking May Help Keep You Afloat

When I was a teenager, my church leaders sent me to a course on lifesaving - of all things. They asked me to become a lifeguard for their summer camp pool program, an assignment I accepted without question.

It was one of the most difficult experiences of my life.

Nevertheless, I passed the course with flying colors and learned a few things along the way, too, about life... and death.

For example, I learned that when a person is drowning, panicked and flailing about, they will literally grasp at anything to keep their head above water – including their rescuer. This can be a precarious position for the lifesaver, and he or she must approach the victim with caution, lest they both be sucked under and perish together. It's actually much easier for the rescuer if the victim is unconscious, or at least so weak that they can't fight back.

I found this same principle to be true in the nonprofit sector, too, over my 30+ years employed by or consulting with nonprofit organizations. Sometimes, the nonprofit will try anything to stay afloat –but often end up sinking anyway. I have found, however, that sometimes when you don't know what else to do, it's best to stop fighting, relax, grab onto the hand that's being thrust in your direction, and let it pull you back to shore.

That's what this book is designed to do. Think of it as your nonprofit rescue buoy. All you need to do is grab hold, do what you're instructed, and in no time, you'll be back on solid ground.

Very often, when you are all alone, bobbing up and down in the ocean, you tend to have time to think. You may ask yourself, “Why am I going under in the first place?” “What caused me to sink beneath the depths?”

I believe there are three distinct, but interrelated reasons. To continue the metaphor, think of your nonprofit as a sailboat with three sails. If one sail is torn or missing, it may not stop you, but it will certainly slow you down. However, when all three sails are strong and in tact, you will zip across the water and not only reach your destination quickly, but have loads of fun doing it!

So what do the sails represent?

1. Leadership

I’ve seen some of the best, most needed (in my view), and earnest efforts falter and fail because the leaders simply did not accurately calculate the amount of support that would be available and the alliances and partnerships that would buttress their noble intentions. The first reason nonprofits flounder or fail is that the vision and the value proposition simply don’t “sell,” and the leaders didn’t have the tools or didn’t take the time to measure this before they poured time and treasure into a passionate desire that was not meant to be.

In addition, healthy organizations establish core values that guide the way leaders and staff do business, and how they deal with each other and with outside people and groups at every point of contact. I have found that it is far too common for autocratic and self-focused leaders to establish one core value: “Do as I say.” These nonprofit heads find it very difficult to transfer authority or to share the limelight and leadership with an empowered team. There is little internal trust, and insufficient values to guard against abuses of power, privilege, and people. It is also an environment in which many unethical and even illegal practices can flourish, and often do. These organizations frequently fail in the first generation, and almost never thrive when the leader with all of the chips finally cashes them in.

Sometimes, the leaders that are in place –staff and volunteer alike- do not have the necessary skills, tools, training or access to resources that will enable them to be effective. I have seen more than one example of nonprofit leaders with good intentions falter and fail because they simply didn’t have the ability to overcome simple challenges or make easy decisions. It’s no wonder that when the tough challenges come along this leg of the stool collapses. The old adage is true: “The road to hell is paved with good intentions.” But, great nonprofits don’t rely on

good intentions, they instead are flush with talented and skilled leadership that can, and do, turn those intentions into actions which propel the organization forward. The right leaders make all the difference in the world.

2. Engagement

I have worked frequently with nonprofits that have almost no real relationships. One organization that comes to mind is a leader in its category, raising millions of dollars through television acquisition and direct mail. Although they rely on active churchgoers for their support, they have almost no relationships with church leaders, local churches, or other religious bodies. In the last 15 years, they haven't pursued any meaningful community contact. All of their energy goes into completing donor transactions. Although this is an extreme example, the tendency is rampant. As they soon find out, when organizations do not have authentic relationships, they are vulnerable to economic downturns.

The emergence of the Internet and subsequent online innovations that have changed the world in many ways has made strikingly obvious a business truth that is actually timeless. If you do not innovate, you will disappear. If there is no adjustment of creative content, communications, or methods for new times and trends you will miss opportunities, and be judged as antiquated (and perhaps irrelevant). Creative presentation and original thinking buy you another look, enable you to capture attention in a crowded field, and present new ways for people to engage with your mission.

With its growth in popularity, social media has become one of the hottest topics in the nonprofit sector for organizations of all sizes and across verticals. What started out as a way to reconnect with friends and family has grown into a means for nonprofit organizations to spread awareness about key issues, mobilize supporters, raise funds and create online advocacy movements. The whole point is this: if you are not engaging your key stakeholders and prospective stakeholders by building meaningful relationships with them, you will flounder. Take time to consider the best methods for doing this, and put the plan in place as soon as you possibly can!

3. Funding

Although many nonprofit organizations manage to squeak by financially, few have enough money to really expand, grow and flourish. The funds just aren't there to invest in planning, future development or to redirect toward an underperforming

program or service. This may be because of the pressure to reduce overhead or because the entrepreneurial spirit of nonprofit leaders causes them to fly by the seat of their pants, to trust their own (often misguided) instincts. It takes money to operate your nonprofit, plain and simple. And, I have found there are two key ingredients to getting all you need. First is a well connected and influential board of directors that properly understands its role as givers, advocates and fundraisers. The second is a well-thought out plan of action, that highlights and capitalizes on diverse income streams. Without these things in place, you are likely to find yourself without the resources you need to fulfill your important mission.

The question at this point is what to do about it. Once again, that's why this book was written.

The compilation the materials in this book is my real contribution to your nonprofit rescue. I have learned that some things work, and some things don't work. I've tried to include here the majority of things that do work –in the right order. That's not to say you can't do it differently, or better. But, if you follow the tactics I have presented here, first by putting the right leadership in place, then by engaging your audience and finally by putting a plan of action in place to secure the funds you need –and then following that plan - your situation will improve. How quickly that will happen, I cannot say. Only, that it will happen.

I truly hope you find this workbook to be a great hand in rescuing your nonprofit from whatever turbulent sea in which it finds itself.

However, if you still find yourself unable to get to the surface, give us a call. That's why I founded Raiser Sharp Consulting in the first place - to provide the kind of affordable expertise you can't get elsewhere, and to do the things you can't do yourself. We have helped hundreds of nonprofits, and we can help you too!

You'll find our contact information at the end of this book.

CHAPTER ONE



PUT THE RIGHT LEADERS IN PLACE



Effective leadership is not about making speeches or being liked; leadership is defined by results not attributes.

- Peter Drucker

Put the Right Leaders in Place

Developing Your Board of Directors

“Although most people recognize that a good Board of Directors can be important for a nonprofit, the reality is that many more people, especially those in high places within charitable organizations, underestimate the role and value thereof.

In fact, some people think that a Board is just there to help establish or run the organization, periodically stepping in when things are going wrong, or to just provide advice and guidance when asked to do so. Then there are those who actually overestimate the importance of a Board, often expecting this group of people (preferably more than 3 and using an odd number set-up, for the sake of avoiding tied votes) to do what would more efficiently be done by a paid staff. The bottom line, though, is that neither scenario is in the best interest of the organization. When a Board is underestimated, it is not allowed to play the roles it needs to play; when it is overestimated, the organization usually suffers for a number of reasons, not the least of which is that the staff (if any) is not expected to develop and to do its job, a "job" which no Board can do as well as a paid staff. Although both of these are indeed a problem, underestimation is a bigger problem, probably because it is more prevalent.

Perhaps the best way to illustrate the importance of a good Board is by giving concrete examples. Before listing some of those, though, it should be emphasized that an assumption is herein being made that the Board that has been selected is indeed a "good" Board. By a "good" Board is meant a group of people who are personally interested in the problem(s) the nonprofit was established to address; furthermore, this should be a group of people who have the credentials, expertise and reputation that is needed to take the organization to where it needs to be.

To that end, Board members should be people who hold high positions in the community, either through education, achievements or status within businesses or other nonprofits, i.e., owners and executives, educators, members of the clergy, politicians, lawyers, accountants, and other "professionals." Having established that this is the case, one can then dwell upon a number of characteristics or qualities which illustrate why Boards are so supremely important.

For starters, a Board (which should preferably be unpaid) can step in when the organization is heading in the wrong direction or is being mismanaged by the appointed officers, starting with the Executive Director (who should preferably be paid and not be on the Board-the only exception being if that person is also one of the founders). In this sense, the Board is the conscience of the organization, the part that is supposed to provide and uphold accountability-which is one of the reasons funding agencies pay close attention to whom is on a Board. Beyond this, a Board represents an organization, like a banner or a flag represents a country or a club, telling potential supporters: "Hey, we are here to make sure that whatever support you give us will be well-used; we are here to make sure that this organization does what it says and is true to its mission, to the best of its ability." To this end, a Board can be crucially important in helping nonprofits obtain the funds they will ask for and supposedly need. It is no wonder, then, that the grading system that many government agencies and private foundations use to evaluate grant proposals includes a section on how good the Board appears to be. It has been said, in fact, that who is on the Board of Directors will often be one of the key components that decides whether an organization gets a grant or not.

Beyond clout and money, a good Board provides a number of important things to a nonprofit. The first, perhaps, is technical expertise, which is why most Boards usually contain members representing all segments of the economy, i.e., lawyers, accountants, healthcare professionals, insurance executives, etc. This is not to say, however, that Boards obviate the need to hire the services of those types of professionals, at least not in a well-run organization. Ideally, a Board is there to supervise, as opposed to actually running the organization or directly dealing with day-to-day events and circumstances--what may be called "the small picture." That scenario should, in most instances, be left to the paid staff-more specifically, to the Executive Director. What the Board provides is broad and general management guidance-in other words, decisions dealing with the "big picture." In addition to this, a Board helps to select and assist the Executive Director (directly holding that person responsible), helps in the making of long range plans for the organization, oversees the performance of the organization as a whole, makes sure that everything the organization does is in keeping with the Mission

Statement, helps the organization to get the money and support that it needs to develop its programs and initiatives, makes sure that the nonprofit uses the funds it gets responsibly and efficiently, and helps to set the tone for what the organization is about, where it is going, what is acceptable and not within the organization, and how to best maintain (and, if necessary, improve) the organization's image and reputation in the community. In a nutshell, it is the responsibility of the paid staff to run the organization and to directly implement its programs and goals; the Board, on the other hand, is there to keep an eye on the over-all performance of the nonprofit, making sure that the goals are met, and that justification for the existence of the organization is carefully documented for any interested party to see. In general, the staff does not have the time (being busy putting out fires and performing basic daily chores), nor the expertise to do what the Board does; the Board, on the other hand, not being on the premises from day to day, also cannot step into the shoes of the staff-which is why, in the best run nonprofits, both entities are essential, but they play totally different roles. Metaphorically speaking, the staff are the firefighters who actually fight the fires; the Board is the Fire Chief who stands on the sidelines, carefully observing and mapping out the best way to put his or her personnel and equipment to use.” (*Why a Nonprofit Organization's Board of Directors is so Important for Nonprofits, Fred Fletcher, [Yahoo Contributor Network](#).*)

For these reasons, we need to get serious about recruiting people who are deeply committed to our mission, effective in raising funds, and with the leadership skills needed for sustainable growth. It's better in the long run to err on the side of brutal honesty rather than seduction.

According to Board Source, the leader in training resources for nonprofit boards, there are Ten Basic Responsibilities of an Effective Nonprofit Board. They are:

- 1. Determine Mission & Purposes** - The Board is responsible for ensuring that the organization's mission is clearly stated. This usually takes the form of a brief written mission statement, sometimes supplemented with a more detailed statement of the organization's goals or values. A commitment to this mission drives the board's and staff's priorities.
- 2. Hire the Chief Executive** – Succession planning is becoming a watchword in today's boardrooms. Unfortunately, the reality is that many boards only pay lip service to this important activity. The aim of succession planning is not actually to

groom an actual successor, and that surprises many. A good plan proposes guidelines for action that can be immediately implemented when that action is necessary.

3. Support & Evaluate the Chief Executive – Providing support for executive leadership, periodically assessing the Chief Executive’s performance, and acknowledging service through compensation, are key board responsibilities.

4. Ensure Effective Planning – Through the planning process, the board and staff translate the organization’s mission into goals and objectives. These goals also become the benchmarks for assessing the organization’s progress over time.

5. Monitor & Strengthen Programs and Services - What the organization does for its members, constituents, or clients helps determine its significance. Accordingly, it’s important that the board monitor the organizations programs and services for impact. Impact is determined differently for each organization but might include the number of clients served or number of attendees at an event.

6. Ensure Adequate Financial Resources – An organization can be effective only if it has enough financial resources to meet its purposes and advance its mission. For most nonprofits, balancing the budget has two basic dimensions. One, finding dependable revenue streams and two, raising money. An organization’s effectiveness in fundraising is directly linked to board members participation. They should first help identify and cultivate potential donors, participate with staff in solicitation efforts, set the example by making a significant personal gift and supporting special fundraising campaigns, and provide stewardship by thanking donors and maintaining relationships.

7. Protect Assets & Provide Financial Oversight – Holding others assets in trust is a very important board function. Fiduciary responsibility requires that the board work hand in hand with the Chief Executive to do four things: 1) to review and approve how the organization budgets, spends and makes money, 2) to verify that the organization’s financial systems and practices meet accepted standards, 3) to ensure the organization has adequate financial reserves and 4) to safeguard the organization’s reputation and ensure it is not subjected to unnecessary risk.

8. Build a Competent Board – When building your board there are three key principles to keep in mind. First, every organization’s governing board will only be effective as its individual board members. Second, members of governing boards

will only respond to the level of expectation articulated to them by the organization and its leaders. Third, a well balanced and functioning board depends on the sustained hard work of the governance or board development committee. Fourth, term limits are an effective mechanism to ensure rotation and a continuous flow of fresh ideas for your organization.

9. Ensure Legal & Ethical Integrity – The board has an important role in compliance, transparency and accountability. Compliance refers to the regulations and legal requirements that are imposed by local, state and federal governments. Transparency refers to providing accurate information about an organization’s revenue and how it is spent. For accountability, the board should ensure the organization adopts a code of conduct, creates and implements a whistleblower policy, keeps detailed records of any lobbying expenses and activities, and conducts an annual audit. The board must also define what constitutes a conflict of interest, establish procedures to deal with conflicts, and require all board members to annually disclose any conflicts of interest.

10. Enhance Public Standing - Board members are the organizations ambassadors. Together with staff, board members must communicate the organizations story and ensure a healthy public image. Board members play an important role in representing the organization to funders, the community, elected officials, and other stakeholders. They should be able to describe the organization’s purpose and activities in a concise and compelling fashion.

When recruiting board members, keep these responsibilities in mind, and identify prospects who can fulfill these responsibilities effectively and with integrity.

I have discovered that most –but certainly not all –nonprofit troubles result from not having the right board in place, or because the board that is in place doesn’t have the capacity to fill the responsibilities listed above. Of course, if you find yourself without a board, you can simply start recruiting the right board members from scratch.

However, the vast majority of nonprofits find themselves with board members who are, simply, ineffective. To correct this problem, I recommend identifying and recruiting new board members who are-or at least can be- effective because they were brought on with the right expectations, and have the right skills and contacts. Use a job description (in the links section that follows), and spell out the duties clearly. This will help eliminate many of the miscommunication issues I’ve

seen over and over again with nonprofit boards. When the right, new, board members are recruited, existing board members will do one of two things: step up, or step off. Both are good.

When an ineffective board member steps up and begins performing at the new level of expectation that's been set, it benefits everyone. If an ineffective board member steps off the board (resigns), it opens up an opportunity to bring on another board member who may be better.

Whether you recruit board members individually or use one of the "fast" methods in the section that follows, put the right leadership in place first, and everything else that follows in your nonprofit rescue will be much easier to implement.

I also recommend thinking about the three sail scenario mentioned earlier, and specifically recruiting board members to help in each of those areas: Recruit someone to serve as a Board Development (or Governance) Chair; a Fund Development Chair; and a Social Media (or Engagement) Chair. If you do nothing else but concentrate on these three areas, you will see a marked improvement in your efforts.



By definition, a director can't be passive. How can you direct anything if you're just sitting there waiting for someone to tell you what to do?

- from Habitat for Humanity International's Welcome to the Board letter

ADDITIONAL BOARD TOOLS

Additional Tools (links)

- [Sample Board Member Job Description](#)
- [Overview of Committees and Organizational Structure](#)
- [Sample Board Organizational Structure](#)
- [Sample Board Organizational Chart](#)
- [Recruiting the Right Board Members](#)
- [Statistical Data for Determining A Board's Diversity](#)
- [Board Matrix – Determining the Gaps](#)
- [Evaluation Guide for Current Board Members](#)
- [Treasure Map for Board/Committee Members](#)
- [Recruitment Cover Letter for a "Direct Mail" approach](#)
- [New Member Nomination Form](#)
- [Suggested Flow for Recruiting Interview](#)
- [Board Orientation Tips and Materials List](#)
- [Board or Committee Interest Survey](#)
- [What to Do with Board Members Who Don't Do Anything](#)
- [Tools for Retiring Ineffectual Board Members](#)
- [Board Meeting Attendance Report](#)
- [Invitation to Serve](#)
- [Board Member Commitment Checklist](#)
- [Board Member Commitment Sheet](#)
- [Keeping Who You Find](#)
- [Positive Strokes Keep Folks](#)
- [Board of Directors Sample Agenda](#)
- [Template for Board Reports](#)
- [Your Organization Night: Building Your Organization's Community](#)
- [12 Ways to Liven Up Your Board Meetings —and Your Board](#)

RESCUE BUOY # 1



Five Fast Ways to Recruit New Board Members

(from Board Café)

We tend to recruit board members from among our friends and acquaintances . . . no wonder we often run out of people in familiar circles to ask. At the same time, we often want to bring people onto the board who are more prestigious, wealthier, better connected, and who can add an important diversity component. We might, for example, want to recruit more people of color, more women, younger members, residents in another part of the county. In short: recruiting is as much about knowing **WHAT** you want to recruit, as **HOW** to recruit.

Here are Five Fast Ways to Recruit:

1. Post your "Great Board Member Wanted" ad on free websites that match people seeking boards to join with nonprofits seeking board members. Examples include:

- www.boardnetusa.org - for its national (if uneven) reach, the info it collects, and the other resources there .
- www.volunteermatch.org - for its very wide distribution, although it's much better known for referring program volunteers than for board volunteers .
- www.bridgestar.org - uses the [boardnetusa.org](http://www.boardnetusa.org) database, but adds individuals from its (mostly corporate) members, and has good additional resources for board members less familiar with the nonprofit sector .

2. Place a "Help Wanted--Volunteer Board Member" ad on your lobby bulletin board, in your newsletter, in the neighborhood newspaper, or in the alumni newsletter of a local college. Example: "HELP SOUTH PARK... We're looking for a few talented and conscientious volunteer board members to lead and strengthen our programs for people with Alzheimer's and their families. If you can contribute your time, thoughtfulness, and leadership one evening a month, and are interested in exploring this opportunity, call Sister Mary Margaret at xxx-xxxx to find out whether this volunteer opportunity is right for you. We're especially looking for folks with accounting experience, with gerontology backgrounds, from the Asian communities, or who are on the younger side of the community.

3. Form a "One Hour Recruiting Task Force." Draw up a list of twenty well-connected people of the sort you would want on the board but who you suspect wouldn't join, (but who might know someone who would be a good board member.) Call those twenty people and ask them to come to one meeting of the Task Force committee over lunch (confess it will actually take an hour-and-a-half). Tell them that at the lunch they'll be told more about the organization and what it's looking for in board members. At the end of lunch they'll be asked simply for the name of one person they think would be a good board member. The Task Force is disbanded. The day after the lunch call up each of the nominees and begin by explaining who nominated them.

4. Promote from the ranks: Ask the program director or the volunteer coordinator if there are two or three hands-on volunteers who would make good board members. Hands-on volunteers, such as support group facilitators, practical life support volunteers, volunteer ushers, weekend tree-planters, classroom aides and others bring both demonstrated commitment AND an intimate knowledge of the organization's strengths and weaknesses. Volunteers, donors and clients should be the first place you look. You don't have to "sell" the agency - they know it already!

5. Board Member Swap: Pick four local organizations where you don't know anyone, but you'd like to (examples: NAACP, Japanese American Citizens League, Accountants for the Public Interest, community hospital). (Tip: Your local Yahoo site (<http://www.yahoo.com/>) is a good place to look for lists under "Community.") Ask each officer to call one of the four local organizations and ask to have coffee with one of their leaders. Over coffee, suggest that your two organizations recommend "retiring" board members to each other as a way of establishing organizational links and strengthening ties among communities.

DECISION TIME # 1

Take a moment and decide which of the items listed above you want to implement in your nonprofit rescue. Write them below, then add a date when you want to have that item completed. Then, simply list who will be responsible for making that happen. Use titles rather than names, as people tend to change over time, but positions do not.

Action	By Date	Person Responsible

RESCUE PLAN PART 1 – BOARD OF DIRECTORS

CHAPTER TWO



ENGAGE YOUR AUDIENCE



It requires wisdom to understand wisdom: the music is nothing if the audience is deaf.

- Walter Lippman

Engage Your Audience

Fishing Where the Fish Are

In an increasingly wired world, supporters are deciding how they want to communicate and receive messages in accordance to their personal preferences. While email, direct mail and traditional websites will continue to play an important role in marketing, social media is now a preferred channel of communication for many people. By “fishing where the fish are,” nonprofit organizations can reach their audience through their preferred means of communication.

Social media is a low-cost, effective marketing channel that allows you to empower your supporters to share your organization’s mission and achievements. It also makes it easier for potential supporters to discover you.

Every day, social media’s influence grows and becomes woven into everyday life. This phenomenon is validated by the rapid adoption of social media technologies. Even more critical for nonprofits is the fact that social media usage is not limited to any one demographic. As of 2013:

- **Facebook had 751 million users** with 23% of these people checking in more than 5 times a day. (<http://www.facebook.com>)
- **Twitter users sent out 400 million tweets per day.** (<http://www.twitter.com>)
- **YouTube exceeded 1 billion unique visitors each month.** (<http://www.youtube.com>)
- **More than 128 million blogs were on the Internet with that number growing exponentially** (<http://www.blogpulse.com>)

Given the sheer volume of potential available for reaching, and engaging an audience, nonprofits would be wise to capitalize on the growing trends. Some of the benefits for utilizing social media include:

1. *Learning what your supporters are saying* and sharing about your organization.
2. *Driving traffic* to your various web properties—website, blog, Facebook, etc.
3. *Improving results* on search engine result pages with keyword rich content.
4. *Driving visitors to online donation pages.*
5. *Enabling supporters to distribute messages* about your organization through their social web presence.
6. *Empowering your most passionate and influential supporters* to promote your organization.
7. *Enabling grassroots movements* in real-time and rapidly responding to unforeseen events.
8. *Humanizing your organization* by not limiting communications to traditional methods or messages.
9. *Acquiring new contacts* and build your email house file.
10. *Increasing trust and loyalty from your supporters* by allowing them to share their voice through feedback forums.

With its growth in popularity, social media has become one of the hottest topics in the nonprofit sector for organizations of all sizes and across verticals. What started out as a way to reconnect with friends and family has grown into a means for nonprofit organizations to spread awareness about key issues, mobilize supporters, raise funds and create online advocacy movements.

Despite its wide-spread adoption, many organizations still have questions about how to use social media to further their missions and how the tools can benefit programs. Common obstacles nonprofits face when adding social elements to their communications and marketing efforts include: resourcing, understanding best practices, learning the nuances of specific tools, and measuring ROI.

As with any new technology, familiarity builds confidence. Additionally, having clear objectives simplifies planning and execution. Social media need not be overwhelming or difficult. It is a supplemental communication channel that can add tremendous value to your supporters and organization.

Many nonprofits continue to struggle with social media and its success. Some don't know how to get started, and others who've been using it for a while still don't know how to define that success.

One of the best ways to ensure social media success is to develop a strategy that lays out clear goals and objectives. When everyone agrees that this strategy is sound, it becomes easier to ask for and get support for the necessary activities.

If you do a Google search for "social media strategy," like I did, you find millions of results from research-based thought leadership (Harvard Business Review) to popular social media blogs (Convince & Convert and Social Media Examiner). You may have even found this ebook through that search. And I'm glad you did.

Rather than focus on lofty platitudes about social media, the rescue buoy below will show the how-to's for creating a social media strategy. Developing your own strategy based on this advice will get you well on the way to social media, and engagement, success.

Once again, I recommend recruiting a board member specifically to help oversee your social media strategy and letting him or her lead the charge for the activities that follow.



Social media is not about the exploitation of technology but service to community.

- Simon Mainwaring

ADDITIONAL SOCIAL MEDIA TOOLS

Additional Tools (links)

- [Convio Social Media Guide](#)
- [Social Media Decision Guide](#)
- [The Millennial Impact Benchmarks](#)
- [How to Really Use Linked In](#)
- [50 Social Media Tactics for Nonprofits](#)
- [Sample Social Media Strategy](#)

Raiser Sharp Consulting Social Media Links:



RESCUE BUOY # 2



How to Create a Social Media Strategy *(from Salesforce Marketing Cloud)*

Step 1 - Set Goals and Objectives

A solid strategy begins with goals and objectives. While social media can be used for ad-hoc campaigns with simple objectives, let's focus on higher-level business goals. Tactical activities like increasing your Twitter followers or getting more people to like your Facebook page are not in themselves useful social media goals. Yes, these audience and reach-building efforts are important and should be tracked, but should not be the focus of your social media activities. And make sure everyone agrees on what success looks like in meeting these goals. If, for example, you were focused on brand awareness, make sure you understand how your social media measurements relate to your traditional measurements and how they both move. Depending on how you are measuring the social component, you may have more impact on moving that number than the traditional metric.

Action Items

1. List your nonprofit's overall strategic goals.
2. Develop social media goals to roll up to company goals.

Step 2 - Determine Your Metrics

The most important part of developing your strategy is determining how you are going to measure your success. Halfway through the marathon is no time to wonder how you'll know if you've crossed the finish line. Establish your

measurements right after you create your goals. If you are trying to increase the number of customer service interactions you have by social media, for example, start by establishing a baseline for what that looks like now. Tie your metrics to your overall organizational goals, otherwise you'll waste time pursuing numbers that don't really matter.

Some examples of social media metrics include:

- Awareness, attention and reach
- Conversions and donations
- Social media leads
- Cost savings

Action Items

1. List the most relevant metrics to measure your goals.
2. Benchmark each metric so you know the starting point.

Step 3 - Determine Your Audience and Update Your Personas

No matter your goals for social media, you have an audience. If you are focusing on donor acquisition, you will be focused on prospects, and your strategy should reflect that. Create and name personas to reflect these prospects. These can be based on existing personas you use in your traditional marketing, but with the added understanding of their social web activity. If you don't currently approach prospects with personas, this is a good time to develop them. Use information that you know about your customers to build these fully-realized audience members.

If you are using social media for client service, your audience will be mostly clients but there will also be prospects and other interested parties. Another key audience that you need to pay attention to is your advocates. These can be fans and supporters of your nonprofit who may never become clients or donors. They may promote your programs, share your content, or even respond to inquiries, but are just not in a position to give. What do they care about?

Action Items

1. List the audience for your social media efforts.
2. Create or modify existing personas for social media.

Step 4 - Discover the Right Platforms

Part of developing the personas referenced above is understanding what sites your prospects, customers and advocates frequent. These are the social media sites that you should focus your organizational efforts on. Warning: prepare to be surprised. Many nonprofits start their social media activities by creating a Twitter profile and a Facebook page and start interacting with their audiences there. But many soon discover more of their supporters and prospects spent time on forums and blogs, so they often reset their efforts to address the audience on these platforms.

Existing supporters are a great source of this information. Your next supporter is likely similar to your current supporter so if you understand what social sites they frequent, and get value from, you can focus your activities on those areas.

A small sample size might be all you need. Gather this information from a few brief phone calls or in-person meetings. (While it is beneficial to collect your supporters' social media profiles, do not send an email survey to all of your supporters asking about their social media activities. That's not very social.)

You can also use a social media monitoring platform to learn where people are talking about your brand, programs and industry. When looking for industry conversations, don't ignore your competitors. It is very likely that they are also building out their own social media strategy and creating social profiles to support it. Can you learn from them and where they are most active? Join their LinkedIn Group to see what kinds of interaction and engagement happens there.

Action Items

1. Select 5-10 supporters and inquire about their social media activities.
2. Conduct your own research to determine which platforms are most important to your customers and prospects.
3. Complete an analysis of your competitors' social media profiles. (Don't deny you have any –they are out there. Recognize who they are).

Step 5 - Gather Resources and Determine Roles

Even the most brilliant strategy will fall flat without a team with clearly-defined responsibilities. If you already have social media marketing team, this is easy. Assign the relevant and ongoing social media tasks to the appropriate members of the team. If social media is their full-time job, this makes it possible to pile on the activities, but do so within reason. Other marketers or customer service agents can add social media to their daily routine to fill out the team.

When determining who is responsible for what activities, consider the following tasks as part of your social media efforts:

- creating content
- posting updates to social profiles
- discovering and curating outside content
- engaging with your community
- monitoring conversations
- analyzing data from conversations
- connecting with internal and external partners

With a good understanding of the kinds of tasks needed, you need to assign these tasks to the right people with the right skills. And don't forget someone needs to bear final responsibility for executing the strategy.

If you will be creating content, someone also needs to oversee that group of activities. Depending on the size of your organization, it could be a Chief Content Officer. They will likely have editors and producers reporting to them as they oversee the creation and curation of content. In most nonprofits, however, it is a Program or Marketing Director that oversees this activity. However, there is no reason many of these tasks cannot be handled by volunteers. It's a perfect place to use people who want to help, love to socialize, and have some spare time to contribute.

You may work in a small organization or even be a marketing team of one. For you to achieve social media success requires a really tight strategy and clear understanding of exactly what success means. While this can be true for all nonprofits, when you are strapped for resources (people and time), it is more important to focus on the right outcomes.

Action Items

1. List all the appropriate social media activities.
2. List all the potential social practitioners.
3. Match up the activities on list one with the practitioners in list two.

Step 6 - Create Content

An important part of your social media strategy is the creation of content to share with your audience on the appropriate social sites. The kind of content you create is determined by the goals you've determined.

Are you looking to attract new clients? Start with educational content. Do not focus on your programs. Help your prospects solve their individual problems. Become a trusted resource by providing blog posts, ebooks and webinars.

Not all content needs to be created within marketing. Get volunteer product managers and engineers on board with creating content. Provide feedback to show them their time is well spent writing blog posts or shooting videos. This includes sharing data from their posts like social shares or leads generated.

Looking to streamline customer service and reduce costs? You can publish social FAQ's as blog posts that are easily findable through search and shareable via social tools. Short videos can do the trick here, too. Gather ideas from your customer service agents. They will know the most common product issues if you don't.

Action Items

1. List the content types that will support your goals.
2. Brainstorm some example titles for blog posts and ebooks.
3. List the possible content creators outside marketing.

CHAPTER THREE



RAISE THE FUNDS



Fundraising is the gentle art of teaching the joy of giving.

- Hank Rosso

Raise the Funds

Do it Right and You'll Have Plenty

The best definition of fundraising I ever read, from the University of Phoenix School of Fundraising, is as follows:

FUNDRAISING IS:

The right person asking the right prospect
for the right amount
for the right program
at the right time
and in the right way.

That's a lot of things to get right. Any, quite frankly, many nonprofits don't.

You can't get these things right unless you have thought about a great many things. Unfortunately, many nonprofits, particularly smaller nonprofits and start-ups, operate without thinking things through. In other words, they operate without a fundraising plan. When someone has an idea for an event or a campaign, these organizations simply put together a host committee or volunteer group and go for it. They may send out a letter here and there, and do some donor meetings, and when the bank account seems to be low, they often go into "panic mode" and race around trying to find cash to keep the doors open.

This is definitely not the best way to run your development program. Even if your nonprofit is flush with cash, running an un-organized and un-planned fundraising operation is a recipe for stress, headaches, and ultimately... financial ruin.

So, how do you avoid this fate? The best way to get it right is by having a written fundraising plan. No matter how small –or large- your church, school, or nonprofit is, or how far along you are into your operations, your group needs a comprehensive, well-written fundraising plan. A written plan will allow you to focus your efforts, plan out your yearly fundraising calendar, and give you guidance on strategy and tactics when you are in the thick of events, mailings, and calls. In short, your fundraising plan will keep you sane in the insane day-to-day world of the development office.

So let's briefly look at this definition and dig a little deeper into who and what is:

The right person: People give to people , not to causes. Many donors give to the person who asks. These donors give because they respect the person who is asking for the gift. They believe in the solicitor — often a volunteer— and comply with his or her request. They give because they have compassion for the population your nonprofit serves. For many nonprofit organizations, the Board of Directors is the primary source of volunteer solicitors. Every board member should be involved in fundraising in some way. The role of staff is to assist board members to find their niche in fundraising; then train them and support them in their fundraising assignments. Whether board, staff, or volunteer solicitor, the person making the request should ideally know the potential donor. This is the best and most effective form of fundraising. If someone knows the prospect, it's a good bet they are the right person to make the ask.

The right prospect: Private contributions in 2012 totaled more than \$298 billion. Individuals gave most of that — about 73%. An additional 8% came in the form of bequests from individuals. Foundations and corporations account for the remaining amount. So, more than 80% came from individuals. Not the government, not corporations, not even foundations. Individuals. If you want to build a sustainable fundraising program, it would be wise to concentrate on individuals. Why? Because that's where the money is. That's not to say you should completely neglect those other sources. They are an important part of your fundraising makeup. Just don't make the mistake of relying too heavily upon them. The answer to the question "Who is the right prospect?" is individuals. The specific names and details will vary depending on how the prospect got engaged with you and who is making the request (The right person).

The right amount: The right amount depends on many different factors, the least of which is how much you need, or how much your goal may be. The right amount is the right amount *for the prospective donor*. Everyone has a different capacity to give. The only way to truly find out what the right amount is for a specific donor is to get to know the donor. The more information you have about the prospect, the more intelligent you can be in figuring out the right amount.

The right program: Donors don't give to programs or projects. They give because they want to help the people who are served by those programs and projects. Donors don't make donations to build buildings, even though many buildings bear the names of donors. Donors give to support what goes on in the building. So, in deciding what is the right program you want a donor to support, think more about the people being served. What changes in behavior can a donor emotionally connect with? Was someone homeless before who now has a home? Were they hungry and you fed them? These are the things that get people interested in making a donation. Make the right emotional connection with a prospective donor, and you will have found the right program.

The right time: There are better times in a prospect's life to make a request for a donation than others. There are better times of year. Some dates and cycles are simply better than others. Once again, it goes back to the prospective donor. Did they recently have a windfall? A big tax return? Might be a good time to make a request. Did they have a death in the family or lose a job? Might be better to hold off with that request. Choosing the right time to make a request is never easy. The important thing to remember here is that you should never expect the donor to fit into your time table. Just because you need the money now is not a sufficient reason for someone to give now. It may just be inconvenient or ill advised. The right time is always when the *donor* is ready to give, not when you are ready to make the request.

The right way: The most important thing you can do, as someone who is fundraising, is to build deeper relationships between your prospect and the organization you are fundraising on behalf of. Because relationships matter, don't rush your fundraising asks (unless your charity is in dire straits). Harvey Mackay famously wrote a business networking book called, "Dig Your Well before You're Thirsty." That's good advice in non-profit fundraising as well. Raising money is hard enough... it's doubly hard when your first contact with someone is an ask for money.

A better strategy is to, as often as possible, make your first a non-monetary ask. Build relationships with your prospects – ask them to come to a free event, read your case for support, sign-up for your newsletter, volunteer at your office. Get them involved (or at least have one introductory conversation about your charity that is not based on seeking a donation), then ask them to give. Build relationships that last, whenever possible. People like to know that their donation is doing something specific and concrete. If at all possible, ask them to contribute to help do something specific, even if it is only to help you reach your own personal fundraising goal. For example, “Would you contribute \$50 to pay for 25 meals for the homeless?” or “I’m trying to raise \$1,000 for the Boy Scouts. Will you donate \$100 to help me reach that goal?”

The number one reason that people don’t give is that they were never asked. Don’t let not having all the right things in place lull you into “analysis paralysis.” At some point, you just have to get out there and ask. The more people you have doing that, and the more people you reach with your requests, will ultimately determine how successful you are in raising funds.

Not to sound repetitive, but I recommend recruiting a board member specifically to help oversee your Fund Development efforts and letting him or her lead the charge for the activities that follow.



Donors don't give to institutions. They invest in ideas and people in whom they believe.

- G.T. Smith

ADDITIONAL FUNDRAISING TOOLS

Additional Tools (links)

- [Fundraising Readiness Survey](#)
- [Sustainability Formula](#)
- [Writing Proposals for Capacity Building](#)
- [Top Fundraising Ideas You Can Use Today](#)
- [The Top Ten Tips for Sponsorship Seekers](#)
- [Planned Giving: What Nonprofits Need to Know— and Need to Tell Their Donors](#)
- [Fundraising Ideas That Work for Grassroots Groups \(Canada\)](#)
- [Preparing for a Really Good “Ask”](#)

RESCUE BUOY # 3



Fundraising Planning Worksheet

(by Stephanie Roth, Mimi Ho and Priscilla Hung: Grassroots Fundraising Journal)

Although fall isn't the start of most organization's fiscal years, perhaps as a remnant of our school-year schedules, it is a time when many of us gear up after summer holidays — often with renewed energy — for the busy fall fundraising season. One task facing those of us with fiscal years beginning on January 1st is the preparation of our annual fundraising plan.

This article presents a systematic way of creating an annual fundraising plan for your organization. The focus of this process is on strategies for building a base of individual donors in order to create a reliable and repeatable source of income.

The six-step planning process this worksheet takes you through will help you create a plan that is based on the realities of your organization's funding base, infra- structure, and fundraising team. We recommend you include both board and staff in creating your plans, along with anyone else who is key to implementing the plan. When the people who are expected to carry out the fundraising activities have participated in developing the plan, their commitment to it will be greater, boosting your chance of fundraising success.

Before calling together everyone you want to involve in creating the details, however, go through the steps here and gather whatever preliminary information will be needed to complete the plan. Then schedule a meeting of all the people who will be key to carrying it out, sending them a copy of the following worksheet pages with the information you have gathered.

You'll see that Step 1 assumes you've already developed your budget for the coming year, or at least a draft that will be completed once you've figured out exactly how much money you can realistically raise.

It takes some time to think through a fundraising plan in this amount of detail, but once you've done this planning, all your fundraising tasks are clear and ready to be implemented.

STEP 1 : GATHER THE NUMBERS

A. What are your projected total expenses for the coming year?	\$ _____
B. How much income, in total, is already committed toward your expenses? <i>(Include only support that is already promised — individual donor pledges that have been made as well as government, corporate, or foundation grants that you are assured of)</i>	\$ _____
C. Subtract "B" from "A" for total amount to be raised:	\$ _____
D. Fill out the following chart with your results from last year's fundraising activities, your current year-to-date figures, and projections for the coming year. There will likely be some parts of the chart that you'll leave blank at this stage in your planning process until you've completed more of this worksheet and can come back to them. The "sources" listed are examples only. Add ones that are relevant to your organization, such as house parties, online appeals, and so on. In the "expense" column for each activity, include in the cost of raising the money not only materials and other expenses but also staff time if possible	\$ _____

Fundraising activities, current year-to-date figures, and projections for the coming year:

SOURCE	LAST YEAR'S INCOME	LAST YEAR'S EXPENSE	CURRENT YEAR'S INCOME	CURRENT YEAR'S EXPENSE	NEXT YEAR'S INCOME	NEXT YEAR'S EXPENSE
Individual donors						
Membership dues						
Events						
Major Gifts						
Mail solicitation						
Other:						
Sales / earned income						
Government						
Foundations						
Corporations						
TOTALS:						

STEP 2: ANALYZE PAST FUNDRAISING EFFORTS

(Use separate sheets of paper for the following questions for each source.)

- For each of the sources of income in the chart in Step 1, note briefly what has worked well to bring in money that you want to do again.
- What hasn't worked? How can you improve or modify these strategies to make them work?
- What are new opportunities coming up that you want to take advantage of, such as a special anniversary, a large organizing campaign, a new executive director?

STEP 3: DETERMINE YOUR AVAILABLE RESOURCES

Resources for fundraising include the people who will be involved in carrying out various fundraising tasks as well as money you'll need to spend on staff time and materials. The expenses were included in Step 1. The following chart will help you brainstorm who you can recruit to your fundraising team.

WHO?	HOW MANY?	WHAT COULD THEY DO?
Board members		
Staff (including program staff)		
Volunteers (including former board and staff, members, supporters)		
Who else?		

STEP 4: STRATEGIES — WHAT WILL YOU DO?

Now think about the fundraising strategies you'll use to build support from individual donors — and in some cases, from small businesses or corporations — from the point of view of getting new donors, renewing current donors, and upgrading current donors.

Acquire new donors — List all the activities you will engage in to bring in new donors, such as direct mail appeals, e-mail outreach, house parties and other events, and individual donor asks:

1. _____
2. _____
3. _____

Renew current donors — List the activities you'll engage in to ask your current supporters to give again. Typically, these include mail appeals, e-mail solicitations, and follow-up phone calls. They also include personal solicitation for larger gifts. Special events are also activities that donors often come to year after year.

Upgrade current donors — Getting donors to consider larger gifts usually requires a more personal approach. The size of a major gift depends on your donor base. For a group with few or no donors, a major gift might be \$100. For a group with several hundred donors or more who give varying amounts, \$250, \$500, or even \$1,000 may be the threshold for a major gift.

1. _____
2. _____
3. _____

STEP 5: HAMMER OUT THE DETAILS

For each fundraising strategy that you plan to use, fill out a separate page with the following information, including the charts, below:

Strategy: _____

Projected income (gross):	\$ _____
Total cost (use worksheet below):	\$ _____
Net income:	\$ _____

Other goals that this strategy will meet (such as get new donors, generate publicity, involve board members in fundraising):

Number of staff and volunteers needed to carry out this strategy: _____

Expenses to complete this strategy:

EXPENSE	AMOUNT	NOTES
Staff time		
Consultant / Services		
Design		
Printing		
Postage		
Travel /Transportation		
Food		
Other:		
Other:		

Activities/Steps to complete this strategy:

DATE	TASK	WHO

STEP 6: PUT IT ALL TOGETHER

Finally, you can pull together all your fundraising planning in one chart that will show what fundraising activities you are doing, how much you intend to raise, from whom, when, who will do what, and how much it will cost.

The following worksheet starts with a couple of sample activities to give you an idea of how to fill it out.

STRATEGY	GOALS	TARGET AUDIENCE	DESCRIPTION	WHEN	WHO	COST
House Parties (total of 3)	\$3,000 45 new donors	Friends and Family of Board Members	Small events in homes of board members	March, May, October	Staff: Help recruit hosts, help create invitations, thank you's, logistical support Board: Host party, invite own contacts, provide refreshments	\$200 per party
Major gift campaign	\$20,000	Current donors; \$100 and up	Personal solicitation; phone or in-person	Oct. 15- Nov. 30	Staff: identify prospects; prepare materials; draft letter; conduct solicitations Board & other volunteers: Identify prospects; conduct solicitations	Minimal; some postage and meeting costs
TOTAL COSTS:	\$23,000				TOTAL EXPENSES:	\$200

CONCLUSION



A plan is only as good as it's implementation.

- Joseph Morrison

CONCLUSION

THE WORK YOU HAVE DONE ABOVE IS THE BASIS OF YOUR OWN NONPROFIT RESCUE PLAN. NOW, SIMPLY COMBINE YOUR DECISION CHARTS (1,2,3) INTO A MASTER CALENDAR.

Take all of the action items you listed in Decision Time #1, #2 and #3 (*found on pp. 20,31, 45*) and relist them below (*or better yet, create a separate spreadsheet outside this workbook*). Combining these three action charts will give you an overall Master Action Plan that you can begin implementing today. Once listed, sort the actions by date (oldest first), and you will have a daily To-Do List on your road to nonprofit recovery.

Stick with it! Don't try to do everything at once. Instead, do a few items each day. If you miss a date, reschedule it for a later time in the calendar. Don't give up! You CAN be rescued! You CAN make it to the shore!

Action	By Date	Person Responsible

About the Author



Founder and CEO
Joseph J. Morrison, Jr.

I began my professional career with the Boy Scouts of America in January, 1985, where I served for 11 years. Among other positions, I have also served as President, M*Power Services, Inc.; Executive Director of Interfaith Housing Development Corporation of Bucks County; Deputy Director, Administration and Finance for Habitat for Humanity of Bucks County and now as CEO of Raiser Sharp Consulting.

I have worked with numerous boards and nonprofits over the years, and have served in nearly every role on both sides of the professional and volunteer spectrum, including serving as Board Chairman for several nonprofits.

In 2010, I formed Raiser Sharp Consulting as a Christian-led, mission focused organization providing Fundraising, Leadership Development and Marketing/Social Media services to nonprofits using a unique service model that can best be described as "shared professionals." My vision is that nonprofit organizations utilize the help we provide to increase their own effectiveness and to further their own missions.

Based in Pennsylvania, Raiser Sharp Consulting aims to be known as the premiere consulting company using the shared resource model in the United States. I love to advise Executive Directors and typically work to support those organizations that need help the most, but cannot afford it –small to mid-sized charitable organizations, such as nonprofits and churches.

If I can assist you in any way, please do not hesitate to contact me by clicking the social media links below, or just visit me online at www.raisersharppconsulting.com.

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