

How do you keep the Momentum Going During Turbulent Economic Times?

Nine Tips for Nonprofit Organizations Moving Forward

You've just participated in a very productive Board Advance and now you are facing some big and scary decisions. Maybe you are considering a move into a different direction, such as developing a new fee for service initiative. Maybe it's a merger or shared services with another organization. Or perhaps you're even considering taking on a for-profit venture. Everyone comes away from Board Advances tired but inspired. But you know the hard work begins now. And that "elation high" could quickly devolve into frustration and apathy without the right leadership and processes in place.

The first few Board and staff meetings following a strategic planning session, or any meeting where important decisions are made, are critical for setting the tone and expectations for the weeks and months ahead. Too often, many of us revert to the patterns and behaviors that are familiar. So how do you keep your board and staff motivated, inspired and on track, particularly if you are a startup organization? The following are a few easy but very effective strategies to keep the momentum going and ensure your organization achieves its goals:

1. Identifying Your Lifecycle Stage

There are five lifecycle stages (idea, start up, growth, mature, decline/ turnaround and terminal). Identifying your organization's particular lifecycle stage will provide you with a valuable starting point for planning and capacity building. There are lifecycle assessment tools available to help you determine where to start. This information will help you set realistic expectations, or SMART goals (specific, measurable, attainable, realistic and time sensitive). We talk more about the strategic importance of SMART goals later in this article, and they can be very effective in helping you understand what lifecycle stage your organization is in and how that information is useful in planning for the future. As one of my client's recently stated following an organizational analysis, "Understanding the fundamentals for capacity building supersede strategic planning. If we don't succeed here, we will never be in the right place to build a successful strategic plan".

A lifecycle assessment will help you understand stage based development needs, depersonalize organizational management weaknesses and help you focus on moving forward in a productive and realistic manner. As you can imagine, organizational needs vary by lifecycle stage. A start-up board, by necessity, is a hard working board that typically focuses on the transition towards more governance and oversight responsibility.

Conversely, a mature board concentrates on policy, is direction oriented, develops community impact measurement s and rotates terms of office for board members.

When it comes to program planning and execution, the needs of an organization also vary by lifecycle stage. The mature organization has clearly defined, replicable programs, whereas the start-up organization often delivers programs with more breadth and depth. In fact, one of the key challenges for the start-up organization is to learn how to differentiate general services or activities into identifiable, sustainable programs.

2. The 50/50 Split

The biggest challenge that boards typically face is time management. How do you get everything you need accomplished? Especially if you are taking on new initiatives or adopting a new strategy. Effective time management is often the biggest obstacle for a start-up working board.

Ensure your board meetings are proactive and productive. Focus on those issues that are key to future success. Agree to spend 50% or more time at each board meeting focusing on your new strategic initiative(s). This will help keep you on track while still allowing discussion on the most important ongoing activities.

Set up a process to make sure board members know the most important and relevant information on current operations, as well as any new initiatives. And stick to that process! Ensure that each committee head issues reports well in advance of board meetings, to help members prepare. Committee heads should check in with the Board President prior to each board meeting to identify any critical issues that should be addressed. This strategy will help you make the most of each meeting and allow plenty of time for added discussion regarding other topics.

3. Start with the Outcome in Mind

How many board meetings have you attended where most of the time is spent discussing or reviewing activities that have already happened? Too often, time is wasted in a board meetings listening to out dated reports from committees. You need to shift this dynamic to make your meetings more productive and enjoyable for your board members.

(see <http://www.compasspoint.org/boardcafe/details.php?id=43>).

When preparing the agenda, think about the outcome you want from the discussion. For example, maybe you have to decide which fee-for-service option is best for your organization or perhaps you are at the beginning of your research period about fee

structures. Think about setting up a team to explore different options and make recommendations to the rest of the board at the next meeting. Encourage people to work together towards a common goal. This will help foster buy-in and strengthen relationships among board members. And as mentioned above, make sure that an agenda and other pertinent information is distributed in advance of each meeting. Your board members should understand what is expected of them prior to each meeting.

4. It's Not Just What You Do, It's How You Communicate!

Essential to the successful operation of your organization is good communication! Clearly articulating expectations is critical and the words you use matter. For example, take the word “urgent”. For someone working in the high tech or medical field, ‘urgent’ usually means do it NOW or at least by end of day. In the nonprofit arena, where most board members have full time jobs, “urgent” may take on a different meaning.

To make sure your team is all on the same page, take the time among to agree on common language definitions and intent. Solicit input for everyone. For example, have the group define and interpret how to respond to typical email subject lines, such as “Urgent”, “Need Response”, or “Information Only”. This strategy will help your board members meet your needs while allowing them some flexibility in determining how they respond.

Similarly, think about how you can structure committee and executive director reports to maximize their impact. Simple uniform changes in format can really make a difference. Consider using the following three headings: what's been done in the past month, what will be done next month, and most importantly (and perhaps highlighted in red!), what help will you need to meet your goals. This approach will help your board focus on what's most important – action when it's required!

5. Context, Context, Context

Providing context for agenda items will lead to more productive conversations, often leading to cost-effective and strategic solutions. It will also foster buy-in from board members.

Let me give you an example. A client recently made a decision to adopt a service-based model for their organization moving forward. At their next board meeting, one of the topics for discussion was a whether or not to attend a conference as an exhibitor. The discussion quickly became tactical, following the usual pattern for a startup board: how much would it cost, how would they find the funds and who could attend from the organization.

Because the context for attending the conference was not discussed first, the discussion was entirely tactical vs strategic. There was never an opportunity to ask the real questions that needed to be answered, such as: What are the services we are promoting, how much do they cost, what is the goal of attending the conference, and will our systems and staff be in place to follow-up with prospects? The board never had the chance to discuss the strategic implication of launching a new initiative, and deciding if a service-based model was the best organizational move. As a result, the plan for attending the conference to promote the organization was shelved for a year – delaying the implementation of the new initiative.

6. The Team Based Approach

How often do you bemoan the fact that you don't have the time to attract new board members and volunteers? You can solve this common problem with some out-of-the-box thinking. Most people are reluctant to join a board because they are worried about the long term investment of time needed for involvement. Why not promote short term involvement? More people will be interested in helping if they know the obligation is time limited. Consider the use of expert, short term teams to achieve well defined goals.

Let's take marketing as an example. Good marketing is increasingly important to nonprofit organizations. If you don't project a good image, you won't be able to attract donors, and people served by your programs will not know your organization exists. Perhaps you need to rebrand your organization by developing a new logo and a new website. Find a marketing expert and invite them to join your board for a short term project. Ask them to work with you and your team to help develop SMART goals in support of developing a new image for your organization. You might add a graphic designer or a web designer to the team. This focused approach will be time efficient too, since it's easier for smaller groups of people to find mutually convenient times to get together. And speaking of getting together, be sure and take advantage of technologies such as WEBEX, FreeConferencecall.com, and free file-sharing on Yahoo or Google.

7. Accountability and Oversight

As mentioned earlier, developing SMART goals (specific, measurable, attainable, realistic and time sensitive) is important, but how many of us really use them and why are they so valuable?

SMART goals ensure accountability and oversight. If you plan to launch a new initiative and no goals or timeline exist for the project, success will be hard to come by. You need to clearly define a timeline, roles and responsibilities and milestones for measuring progress. Without a well-defined process with built in- accountability, your team may

have a great time working together but at the end of the process, you may have nothing to show for it.

8. Feed your Board Members Information

Not every board member is well educated about what is required to manage an organization – especially when it comes to financials. And no one wants to admit in public they don't understand the documents you have put in front of them. Why not level the playing field and provide an educational session for board members at a quarterly meeting? You can choose a different topic each time, and dedicate 30 minutes on the agenda for education. You might even want to ask other Board members to help you by facilitating a session in an area of their expertise. Your Board members will thank you for helping them look smart!

9. The Strategic Board Agenda

It's a secret that no one wants to talk about. Most Board Meetings are boring. They focus on looking in the rearview mirror, and let's be honest, reviewing committee reports and listening to the Executive Director report can be tedious. Nothing is more frustrating to a Board Member than investing time at a meeting with an agenda that contains nothing substantial. Why not try a new approach? For example:

- 1) Agree on a process that requires committee chairs to distribute reports via email in advance of board meetings. This allows Members the chance to prepare their thoughts in advance, and be ready participants at the meeting. They will feel more committed and energized!
- 2) Suggest that committee chairs inform the Board chair and Executive Director of topics to be discussed at a board meeting where a decision or input is required by the full board. Make sure the required outcomes are clearly identified.

There are many strategies you can use to make your Board meetings more fun, informative and exciting. Just think what that will say about your organization!

For more tips and information on lifecycle assessments or consulting, contact nadia@emergingexecutive.com

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