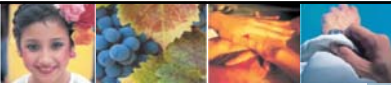


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COMMUNITY FOUNDATION OF JACKSON MOLE

Top Ten Clues That Your Nonprofit May Be in Trouble

John Heymann
NewLevel Group

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Purpose

Explore critical issues facing nonprofit boards in these difficult economic times.

1

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Agenda


- ✓ Welcome, Agenda, Ground Rules
- ✓ Introductions
- ✓ Top Ten Clues
- ✓ Effective Sustainable Organizations
- ✓ Analyze Challenges/Explore Solutions
- ✓ Attributes of Functional Boards
- ✓ Wrap Up

2

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Logistics and Ground Rules

- ✓ Contribute
 - Share experience, expertise, questions
- ✓ Honor confidentiality
- ✓ Honor timeframes
- ✓ Share what you learn with your organization
- ✓ Cell phones off
- ✓ D.W.Y.G.D.
- ✓ Evaluation Form



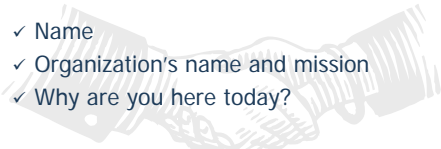
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Introductions

- ✓ Name
- ✓ Organization's name and mission
- ✓ Why are you here today?

1 minute each



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Building An Effective, Sustainable, Impactful Organization

"To make the greatest impact on society requires first and foremost a great organization, not just a great program."

Jim Collins, Good to Great and the Social Sectors



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Top Ten Clues

That Your Nonprofit May Be in Trouble

- 10 – One of your reliable funders just told you they're going to pass on your request this year
- 9 – You haven't had a quorum for your board meetings in six months, and Board recruitment consists of asking your friends to join
- 8 – More than 50% of staff has turned over in the past year
- 7 – Fundraising is rarely on the agenda because everyone is contributing by donating their time
- 6 – You have seven Standing Committees, but none have met since last year

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Top Ten Clues

That Your Nonprofit May Be in Trouble

- 5 – People in the community ask you if you're a new organization and you've been operating for 30 years
- 4 – Your Executive Director is burned out and has announced that she's planning to leave
- 3 – Revenue is down 25% but no changes have been made to reduce operating expenses
- 2 – You haven't seen financial statements for two months or more
- 1 – The organization doesn't have a line of credit or a reserve fund and is down to one month of cash-on-hand


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Attributes of Sustainable Nonprofits

- ✓ Clear and compelling vision and mission
- ✓ Passionate, engaged Board of Directors
- ✓ Effective communications and marketing
- ✓ Strategic approach to fund development
- ✓ Motivated, professional staff

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Clear and Compelling Vision

- ✓ Brief, well-defined vision and/or mission
- ✓ Statement of core values
- ✓ Community assessment and feedback processes
- ✓ Focused approach that is not redundant with other organizations' programs
- ✓ Defined measures of success

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Passionate and Engaged Board of Directors

- ✓ Strategic approach to board recruitment & succession
- ✓ Board members are articulate advocates for the organization
- ✓ Clearly defined and consistently practiced roles & responsibilities
- ✓ Clear expectations and accountability for board members
- ✓ Written policies and procedures

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Attributes of Effective Communications

- ✓ Strategic marketing plan
- ✓ Clear, jargon-free messaging, with great stories to demonstrate mission success
- ✓ Proactive communications to constituents and the communities served
- ✓ Network of key influencers
- ✓ Strong, content-rich website

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Strategic Approaches for Funding

- ✓ Strategic fundraising plan
- ✓ Demonstrated support and participation by the board
- ✓ Balanced portfolio of funding sources
- ✓ Constituent relationship management program in place
- ✓ Endowments and reserve funds

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Motivated, Professional Staff

- ✓ Clearly defined roles and expectations
- ✓ Skills and experience commensurate with needs
- ✓ Appropriate compensation
- ✓ Respectful, supportive work environment with regular, constructive feedback
- ✓ Adequate resources available

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Organizational Assessment

- ✓ Complete and score assessment on your own
- ✓ Discuss with colleagues at your table



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Discussion

Using your completed assessments to evaluate the elements of sustainability for your organizations:

- ✓ What “ah-ha” did you have from completing the assessment?
- ✓ Which of the five elements are ‘best practices’ in your organization?
- ✓ Which elements do you need to explore further?

10 mins.



15

Attributes of Effective Boards

FOCUS ON RESULTS
ACCOUNTABILITY
COMMITMENT
CONSTRUCTIVE CONFLICT
TRUST

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Functional Boards



Complete the assessment
Score answers

Discuss results with your colleague(s):

1. What are areas of strength for your board?
2. Where can you make improvements?


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Top Ten Clues

What are your organization's challenges?

Q & A



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Top Ten Clues

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Top Ten Clues

That Your Nonprofit May Be in Trouble


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Next Steps

- ✓ What's one thing you can right away to apply what was learned?
- ✓ How will you communicate what you've learned to other board and staff members not present?



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