

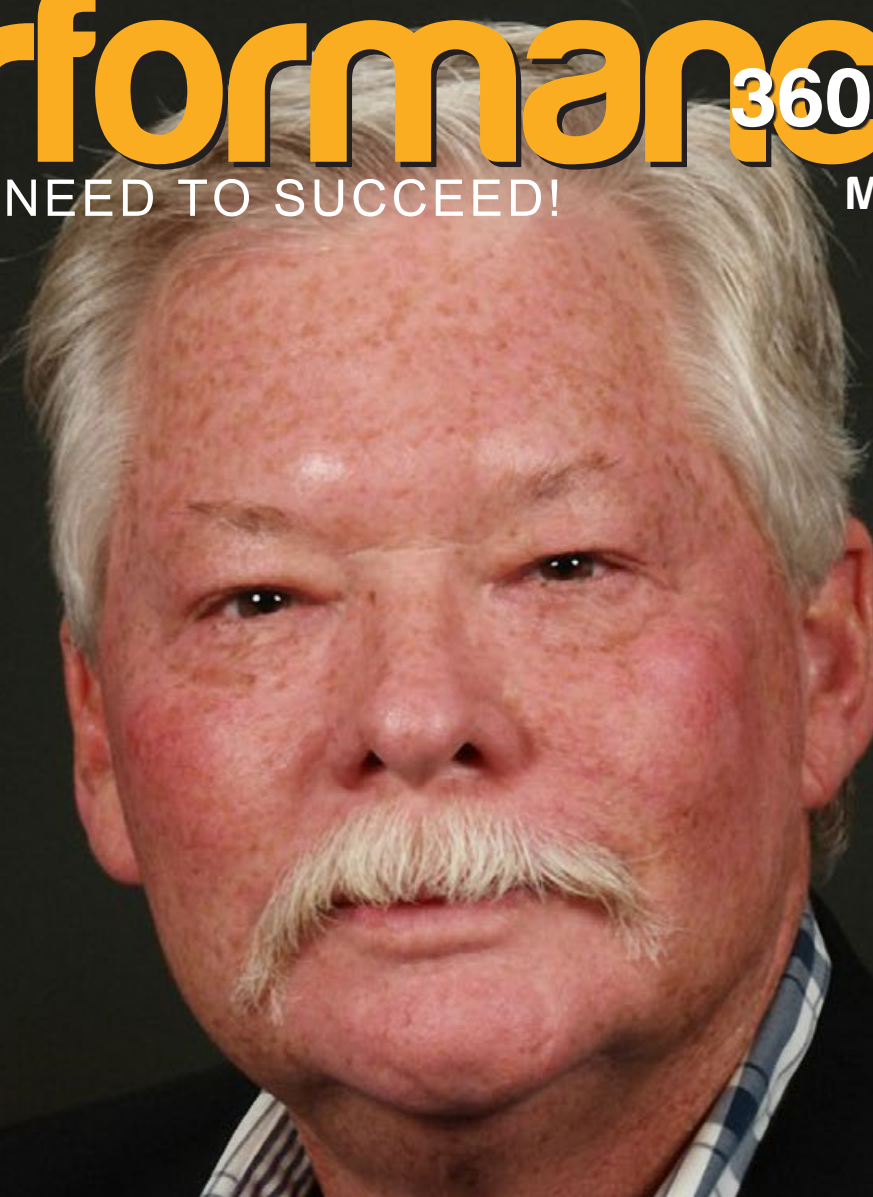
Nonprofit

# Performance<sup>360</sup>

WHAT YOU NEED TO SUCCEED!

Magazine

Vol. 4 No. 1



**Frank Shankwitz**

Make-A-Wish  
Foundation Founder



Hugh Ballou



Thyonne Gordon



John Kilpatrick



Marc Yaggi



Hillary Schafer



Leasha West



Jeff Magee



# ONE TO ONE

## BULLETIN™

### THREE TIPS TO MAXIMIZE NONPROFIT DIRECT MAIL

If you're a nonprofit, you know how critical direct mail is to fundraising. Here are three tips from the experts on how to maximize your efforts.

**Direct mail is the #1 motivator for donations.**



With so many "free" marketing channels out there, it might be tempting to transition much of your fundraising to electronic media. However, direct mail remains the strongest, most effective way for nonprofits to solicit donations.

According to YouGov<sup>1</sup>, 21% of people gave to a nonprofit last year because of a print solicitation. This is compared to 12% who gave through mass media, 6% through social media, and 10% through email. To keep donations flowing, don't stop the direct mail!

# 1

*Print is the most effective way for nonprofits to solicit donations.*

**Your house list is gold.**



Treated right, most people who donate to an organization will do so again. That's why your house list is the most important list you have. Keep this list clean, up to date, and treat your donors like the most important people in the world — because they are.

What about prospecting? Purchasing a relevant direct mail list is an important way to bring in new people who might be interested in your mission, but it will not be your primary source of donations. Prospecting helps to expand your donor base, but your house list is the primary source of your fundraising dollars.

# 2

*Treat your donors like the most important people in the world.*

**Do more than ask for money.**



When it comes to a person's likelihood to donate, the most important factor is his or her personal connection to the organization. To increase donations, use direct mail to build real, lasting relationships with donors over time.

- Make sure your donors understand your mission and where their money will be used.
- Write to donors by name and personalize your messaging based on the specific areas or projects to which they have donated.
- Provide pictures or stories about the specific ways their donations are being used. If people are donating to an ongoing project, keep them in the loop on the progress.

# 3

*Make sure donors understand where their money will be used.*

<sup>1</sup>YouGov "Giving Report" (2013)

photography and illustrations ©iStock 2014.



Do you struggle to identify new funding sources?

Do you have a grants strategy for 2016?

Does the lack of time limit your ability to submit grant requests?



*These are significant issues that many nonprofit organizations, houses of worship, educational institutions, and government entities struggle to overcome. Unfortunately, history tells us that these are all issues that often precede a crisis in funding.*

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At GrantStation, our mission is to keep your organization financially healthy by building a strong grantseeking strategy.



*Looking for more assistance? Tap into GrantStation's professional staff to identify a stellar panel for your conference focused on philanthropy, develop an internal grantseeking program for your organization, and customize mission-specific webinars on the current state of grantseeking. We also offer survey research and analytics services.*

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## *Publisher's Corner*

SynerVision Leadership Foundation's **Nonprofit Professional Performance 360 Magazine** has been publishing for over three years! As co-publishers, Dr. Jeff Magee and I, thank all of the contributors who have made this magazine the trendsetting reading choice of nonprofit leaders around the world. We have readers in almost every country where English is spoken.

Many readers choose to read the magazine online using the flip reader. If you do, please click on the image that makes the magazine go to full-screen viewing. It's much better that way. Our designer, Kim Cousins, puts her amazing design skills to work in making the magazine look really great! Make it full screen to get the full impact.

You may not know that you can purchase a PDF version that is sent directly to your email inbox, or you can purchase it on for viewing on your iPad as well as receive a print version to your office or home address. By the way, when you purchase the print version, you receive the PDF version as well.

The feedback from readers has been unanimous! Everyone feels that the articles are very useful because they are relevant to the real-life issues that leaders face today. We welcome your written feedback and suggestions for contributors or additional topics to be addressed. You can email the team at [support@synervisionleadership.org](mailto:support@synervisionleadership.org) with your suggestions and comments. We read all your messages.

If you haven't looked at the articles on our website, [synervisionleadership.org/blog](http://synervisionleadership.org/blog), you are missing out on some really great resources. Please take a minute when you read an article to leave a comment. We want two-way conversations and interactive relationships with leaders moving charities in a new era of prosperity and effectiveness.

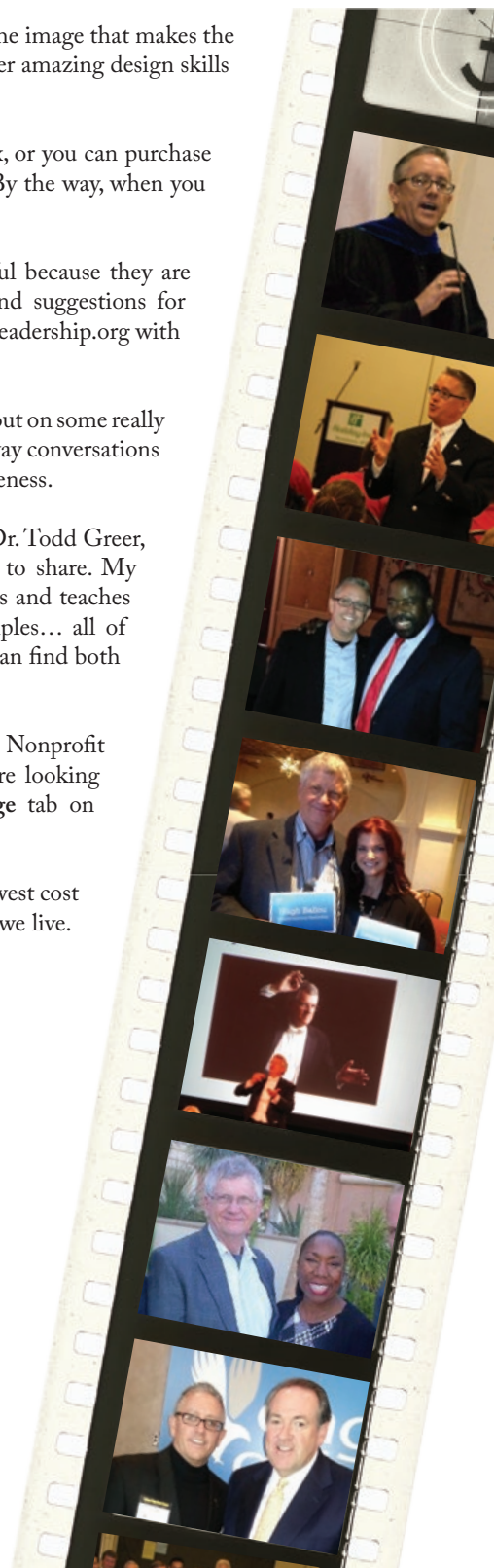
Other resources include two podcasts. *The Nonprofit Exchange*, started by our Managing Editor, Dr. Todd Greer, contains interviews with thought leaders who have a proven track record and have messages to share. My podcast, *Orchestrating Success: Converting Passion to Profit* addresses profit in its various meanings and teaches basic leadership principles, business principles, and organizational culture development principles... all of which impact our ability to fund the organization and enable it to fully achieve its mission. You can find both podcasts on iTunes and Stitcher.

In 2017, we are launching a revolutionary new concept in LIVE events that we are calling the Nonprofit Leadership Excellence Summit. The format is unique and the presenters are incredible. We are looking for sponsors and applying for grants to launch the first Summit soon. Click on the **Engage** tab on [synervisionleadership.org](http://synervisionleadership.org) to learn more.

As we continue to seek the best people to provide you with the best resources for free or for the lowest cost possible, we consider ourselves to be your partners in creating more value for the world in which we live.

Let us know your needs, your ideas, and your commitment to excellence. Let's chat.

*Hugh*





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- Learn from key thought leaders who can assist you in propelling your organization to reach its potential
- Read in-depth stories written by those who have found success at the front line of the social benefit journey
- Learn about the impact of community, communication, and collaboration in your organization

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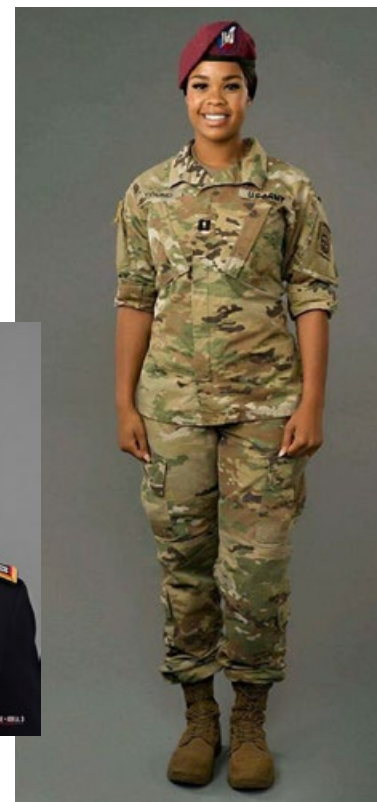
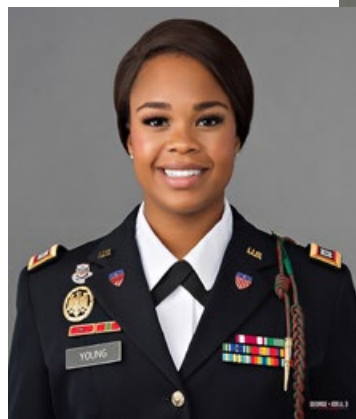
## Next Issue Highlights

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To everything there is a season... and as seasons change, so do the people, programs and emphases of organizations. In the upcoming issue of **Nonprofit Performance Magazine**, we will focus on the inevitable transitions in the nonprofit world. Our contributors will lay out a road map for managing change in the leadership and governance team, how to find new life after the “death” of a program, and how the conclusion of a grant can actually provide new opportunities for a nonprofit to flourish.

Individuals change, too. Our feature is a young woman who planned to spend her career in the military. After 10 years in the ROTC and on active duty as a U.S. Army officer, she realized that her passion was to be a doctor. Not only was she leaving a full-time job to pursue medical school, she was transitioning from the military to civilian life.

Learn about her top eight tips for turning a leap of faith into a smooth transition to a better chance of success.



Join the SynerVision® online Community for Community Builders and get the following:

- Resource articles on best practice for nonprofit leaders and clergy
- Interview with thought-leaders on business practices to install in your charity
- Forums on topics relevant to nonprofit leaders, boards, and staff
- Regular facilitated mastermind sessions guided by Hugh Ballou (“Leader” Level)
- Free subscription to Nonprofit Professional Performance 360 Magazine
- Discounts on online learning programs and live events

Here’s the overview of the benefits of community membership

[synervisionleadership.org/welcome-to-the-community-for-community-builders](http://synervisionleadership.org/welcome-to-the-community-for-community-builders)



# One Hundred Years of Sustainability



**H**appy 100th birthday! This is a milestone that most nonprofits strive for, but only a few seem to reach. So how do successful long-standing nonprofits achieve this centennial status? Pretty Lake Camp in Kalamazoo, Michigan, celebrated its 100th birthday in 2016 and has significant insight on planning for sustainability as it carries on for the next 100 years. Hint: it's not all about the money!

Don't get me wrong; money is the fuel that runs the engine. However, the underlying strategy is relationships, relationships, relationships - that's the secret sauce! Let me explain. When relationships are planted and nurtured, they grow over time and can be harvested in numerous forms. With Pretty Lake Camp, this is via volunteer service, donations, publicity, referrals, and on it goes. One of the cornerstones of the overall strategic plan is to build intentional relationships with community members and others who have an affinity for summer camp, and who desire to directly impact youngsters in a lasting manner.

This doesn't mean attending networking events and buttering people up to ask for donations. It goes something like this: invite people to tour the camp, enjoy a fresh-cooked meal, prepared by the resident chef introducing the camp's Farm-to-Table initiative, with the Executive Director and a board member; visit the farm, observe the

garden, meet the donkeys, mini-goats and pigs; discover the Adventure Center; take a pontoon ride on the lake and learn about the programs that Pretty Lake has to offer. Get it? Folks come out to Pretty Lake and fall in love with the place - and subsequently write checks every year. That's what sustainability looks like. Yes, financial sustainability is a necessary, intrinsic, core goal, but emotionally connecting with enthusiastic supporters should be top priority for any organization.

While many nonprofits strategize for multiple revenue streams, versus the conventional funding of charities by way of donations - meaning a combination of grants, investments, passive income, etc. - private donations still dominate as the main source of funds.

According to a donor survey conducted by Pretty Lake, one of the highest ranking factors that swayed donors was the leadership team. That's right, the person sitting at the helm was incredibly impactful in the donor's decision-making process. Even though the relationship and emotional connection with the organization were present, who's running the show made all the difference. The most desired specific leadership skills included the ability to inspire, be decisive, innovate, provide direction, prioritize and be adaptable. Transparency, reputation, and trust were non-negotiable. These qualities embody the Pretty Lake leadership team. What does your

leadership team represent? Could this be hindering your sustainability efforts? Maybe a donor survey is in order for your nonprofit. You might be surprised by what you learn.

The final piece to Pretty Lake's sustainability model is the careful selection of their board of directors. Every board member has been deliberately recruited and hand-selected based on their connection to the camp, their level of involvement, and their individual unique skillset. Rarely are there board openings, as every director is deeply committed. The devotion from the board, coupled with the stellar leadership team, solidifies the confidence in Pretty Lake donors and keeps them coming back and relentlessly promoting the camp. Have you performed an honest assessment of your individual board members? Is every director going above and beyond the scope of their duties, or are they there to pad their résumé? These are the tough questions that must be tackled. Your 100th birthday depends on it.

Leasha West, CEO of West Insurance & Financial Group, is a highly decorated Marine Corps veteran and respected community leader. Leasha dedicates her life to helping others and sits on the board of directors for many nonprofit organizations. As a result of her outstanding volunteerism, she was awarded the President's Volunteer Service Award by President Barack Obama. To learn more about Pretty Lake Camp, visit [www.prettylakecamp.org](http://www.prettylakecamp.org)



## Linking Needs with Donors



It's an interesting concept: nonprofits create a profile with a wishlist that links to Amazon. The donor chooses what he wishes to donate through a nonprofit's profile, buys it from Amazon, and it's delivered directly to the needy organization.

MyFiki (My Fundraising Initiatives based on Kindness and Involvement) was born out of a perfect storm. I moved to Montclair, New Jersey, with Tara Fardellone, my better half and co-founder, after a few years in Atlanta after college. My job transferred me to Manhattan and Tara accepted a position as the part-time Executive Director for a nonprofit organization providing affordable housing for independent seniors. As Executive Director, she ran an organization that had dire needs for goods and a shoestring budget, so financial contributions usually went to operational expenses. She came home every day, feeling the strain of not having basic necessities for her residents and organization. New beds, cleaning supplies, and emergency exit light replacements were some of the goods she needed to buy but couldn't always afford. I heard her pleas for help, but didn't know how to solve the gaps in fundraising for goods. Her other position was also in a nonprofit, and she saw similar needs at both.

Meanwhile, in every town we've lived in, we've volunteered at the local animal shelter. On our first visit to the Montclair Township Animal Shelter, we pulled in around an hour before closing and learned that they were

running low on most of the basic supplies they needed for the animals in their care. We rushed to the store and filled the car with new towels, wet food, dry food, treats, and toys for the animals. In a few days, however, the supplies were gone and their needs were greater than ever.

All nonprofits have needs, but an implicit understanding exists in the industry that beggars can't be choosers and nonprofits need to make do with what they receive. The giving spirit was alive in Tara's organization, but at one point, she had a fundraising mailing to distribute and couldn't even afford the postage. It was clear that space existed for in-kind fundraising to be vastly improved.

My passion in business led me to entrepreneurship and I had a unique idea that could make a real difference, if we could do it right. After many nights of brainstorming, Tara and I became small business owners and registered MyFiki as a business. Our website, MyFiki.org, serves many purposes. Offering nonprofits a louder voice in the in-kind fundraising arena became our first issue to solve. I immediately began developing our website, which allows nonprofit organizations to register for a profile, which includes a fully interactive wishlist that connects to Amazon.com and allows nonprofits to pick the exact items and quantities they need so that the public can donate them. That way, they get the goods they need without being flooded with unnecessary supplies.

The profiles accomplish so much more for an organization than just sharing an Amazon wishlist. They provide small organizations with limited or nonexistent marketing budgets with a completely free space to build their online presence. The profiles also allow complete transparency in the donation process, which facilitates the building of trust between an organization and its donor base. Donors know exactly how their money is being spent, and rest easy knowing that it is not just disappearing into a bank account. They conveniently buy what they can, and the items are delivered for them. Purchases through MyFiki.org increase donor engagement because items are shipped to the organization instead of forcing donors to find time to drop goods off. Further, someone who wants to donate a small amount knows their donation still makes a difference, when often a small financial contribution seems insignificant.

The profiles for each organization serve a greater purpose: to build a collaborative community of nonprofits. When a nonprofit registers on MyFiki.org, they become a partner with us. They receive free social media publicity from us and we spotlight their needs as often as we can. In addition, our partners are encouraged to communicate with each other and share resources, providing a network for organizations which could not otherwise afford those relationships. Many hands make light work, and resource sharing

is a way for the partners to help each other help themselves.

We started small and began building relationships with organizations in the local region. We wanted to start with not only in-kind fundraising, but also with education. We needed to teach nonprofits to question the system to which they were accustomed, and to begin asking for what they needed. We also needed to teach them that they were in complete control and to take more responsibility for the process. We don't charge anything for MyFiki and we never will. The prices for the items are the same whether or not they are purchased through MyFiki, and we charge NOTHING for any of our services. This helps to prove to nonprofits that we are there to help them, not to take advantage of their circumstances. Although we started locally, we currently have partners in fourteen states, and will continue to spread nationally as we grow.

Our website provides donors with a simple way to support partner nonprofits. Donors visit a partner's profile and see basic information about an organization,

including images of the organization at work, which often evokes an emotional response that connects donors to the organization. Nonprofits have sections to concisely explain who they are, what they do, and what help they need, so that donors don't get lost in content, nor do they have to search far for more details. All of an organization's social media links are on the page as well and, once in a profile, the call to action is evident: click on the wishlist and help right now. MyFiki is proud to serve as a hub of information and action for our partners and their donors.

This process hasn't been an easy one. Nonprofits have grown skeptical and often believe that we are in it for something else, but we truly just want to help. We want to make a difference in this world, and we want to multiply our efforts by showing donors how easy it is to support an organization. Previously, I never knew that nonprofits had so many needs. The people who run these organizations do so much with so little and change the lives of many people, animals, and communities. They often spend their own money and lead thankless jobs, humbly doing more since no one else is there to help.

If you have a new idea, but you're afraid that it won't work or that you haven't figured it all out yet, that's okay. Do it anyway. You don't have to have all of the answers at the beginning. Don't let anyone tell you otherwise if you're planning on starting something new. Your biggest obstacle is yourself. Get out of your own way and let the idea grow. MyFiki started with buying some towels for animals and has continued to grow into 44% increased donor engagement. More importantly, MyFiki has grown into an outstanding network of incredibly dedicated staff, volunteers, and donors who all want to make this world better. We're grateful to know all of the people we have met from this experience and we're excited to see it continue to create tangible change in our world.

Rafik Tawadrous is a volunteer turned social entrepreneur. For over 10 years, he's been looking for ways to give back. By day, he analyzes numbers as a group health insurance financial consultant; by night and on weekends, he loves working toward leaving a positive mark in this world by leveraging technology.  
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# Making People Care

## Crafting Effective Design



**N**onprofits have compelling stories to tell. As a creative firm, we do design work for nonprofits to help them tell their tales. We like to listen to these stories and figure out how to convey them in a way that can be easily understood and amplified. Our end product channels these ideas, allowing the audience to be emotionally engaged and to take action.

So how do you tell a compelling story through design? You can find stories everywhere, but the most compelling ones will move you emotionally. Every nonprofit we've worked with is driven by a cause, has shocking statistics to share, or has a sincere desire to change conditions for the better. Their brand stewards should ask these questions at the outset of any project:

1. How do you make people care about your cause's story?
2. How can you make it easy for them to become engaged and mobilized?
3. How can you keep it simple and accessible?

Answering these questions with your internal marketing and external design teams will help capture initial ideas. Then step back and leave it to the designers to craft a solution.

There are a few key factors that guarantee the success and effectiveness of your design project. Clear communications and a willingness to

collaborate should top your list. Successful projects are created collaboratively without stepping on anyone's toes.

These steps should be kept in mind as you're planning your design project:

### 1. Planning

- Define objectives and stakeholders
- Get organized
- Have realistic expectations
- Write a solid creative brief

### 2. Production

- Engage a design firm
- Manage the review and approval process
- Launch the project

### Define Objectives and Stakeholders

Everyone has a different definition of what success means. It's important to include all stakeholders early in the creative process, allowing everyone the opportunity to influence the outcome of your project. Many organizations we have worked with have a board of trustees, making it non-elective to include everyone's thoughts as you define the overall objectives. Informing your designer of potential challenges with specific stakeholders can often help avoid problems getting buy-ins further down the road.

When we worked with From The Top, a Boston-based nonprofit, we were warned that one of the co-CEOs wasn't open to modernizing their logo. With this in mind, we crafted our branding presentation in such a way that eventually convinced both co-CEOs to go along with our recommendation within a month. This, in turn, enabled us to relaunch their website with an entirely new, fresh, and modern look two months later, just in time for fundraising season at the end of the year.

## Get Organized

Most graphic designers are not content creators. At minimum, your project will require copy and images, though recently we have found video/motion graphic content to be very effective in connecting with audiences, especially when amplified by social media campaigns. Regardless of the form of your content, make sure your designers understand early in the planning process what types of content they should expect to receive from you. This will help them plan their production process accordingly.

When we worked with Brighter Bites, we collaboratively organized a photo shoot of fresh fruits and vegetables to enliven various sections of the website. Paired with tongue-in-cheek copywriting by Principle (Houston, Texas), the website provides useful information about their mission to teach school children to prepare nutritious meals at home while turning their frown upside down.

## Have Realistic Expectations

Get your design/production budget and deadline cleared up front. You don't want to design an oversized poster if all you can afford to print is a mini postcard. Nothing in this world is free, not even that tiny Facebook ad you have looked away from after a split second. Someone spent the time to craft this tiny ad, regardless of its success rate.

When we worked with Design Trust of Public Space, we were advised during the kickoff meeting of their small production budget to promote their annual benefit auction. To support the theme of 20 Public Space Champions/20 Years of Groundbreaking Work, we designed invitations and posters in vibrant colors with an interlocking 20/20 graphic. This clever, low-budget approach helped them close the auction night with tremendous success.

## Write a Solid Creative Brief

A well-written creative brief helps everyone plan effectively. Depending on the project's scale, you may be working with copywriters, researchers, designers, programmers, printers, marketers, and others. A concise creative brief aligns everyone's expectations from the outset, so follow these rules:

1. Be clear about project objectives and audience.
2. Detail production specifications (e.g., size, format, page count, colors). If it's a digital product, detail the technical requirements (e.g., responsive, CMS, SEO, target browsers).
3. Explain the kind of content that will be provided (e.g., copy, images, videos) and how they will be supplied.
4. Clarify the roles of everyone involved, including the stakeholders, creatives, and third party vendors.
5. Draft a realistic schedule from project kickoff to final delivery.
6. Clearly explain budget constraints and expectations.

If you're not sure where to begin, ask an experienced designer to help draft the creative brief.

## Engage a Design Firm

With a creative brief and content plan in hand, you are ready for a kickoff meeting with a design firm. Seasoned design firms can digest and provide recommendations based on your initial conversation and help fill in any gaps in your project plan from creative and production standpoints.

If you're not sure where to look for design firms that fit your project requirements, there are many resources online. Most of our nonprofit clients were referred by existing and past clients. For us, referrals still prove to be the best way to connect with potential collaborators because it is based on trust.

## Manage the Review and Approval Process

It's important to make sure your designer can maintain a singular channel of communication with your organization. Usually this task is handled by the Communications Director, who can ensure the following are achieved:

1. Organize internal feedback into bite-sized, non-conflicting comments for the designer.
2. Collaborate with the designer to allow for a certain degree of creative interpretation by being not too prescriptive when providing feedback. Graphic designers are excellent problem solvers and should be given a chance to solve problems instead of being told how to do everything.
3. Proofread and fact check the content. Some photos, illustrations, and video content may also need licensing clearance.
4. Stick to the agreed upon schedule; if you find you are falling behind, adjust it diligently.
5. If your project is a digital product, make sure to do extensive user testing prior to the public launch.
6. If your project is printed and tangible, make sure there's ample time for printing/production and delivery/installation.

For the Vilcek Foundation, we were asked to design a one-of-a-kind holiday card on a set budget. After we presented a few ideas, the selected idea cost more to produce. However, because we maintained a clear channel of communication with the Executive Director, we managed to get buy-in on the more costly but more rewarding approach. Even though it took longer to produce the die-cut metal ornament cards, they were delivered in time for the holidays. Our most rewarding projects are those where the client allows a good deal of creative freedom and goes along with it.

## Last Words

Nothing is more rewarding than seeing your project come to fruition, especially when it's well-designed and well-received. But at the end of the day, a streamlined creative process means you can spend more time focusing on achieving your organization's mission.

John Kudos is Founder and Creative Director of KUDOS Design Collaboratory, helping nonprofit organizations across multiple sectors produce communication platforms that make people care and respond to the call of the cause. The work of KUDOS includes brand identities, annual reports, benefit invitations, posters, signage, art catalogues, mailers, and digital work ranging from responsive websites to banner ads and animations, social media campaigns, web apps, and microsites. [kudos.nyc](http://kudos.nyc)



# Building a Sustainable Grants Program

Most organizations take the time to build membership development programs or major donor programs, but very few invest energy into a true grantseeking program. We often react to grant opportunities rather than planning our approach to grantseeking.

I've worked with nonprofits for years, helping find grant funds and focusing on building a program to keep the grant pipeline full. To build a sustainable grants program, it's important to adopt a process and use that process consistently:

1. Develop a consistent approach to grants research.
2. Build a grant strategy around each project that needs funding.
3. Use a grants calendar to stay on point.

## The Grants Research Process

To make your research efficient and productive, and to prepare for writing letters of inquiry, complete a project description worksheet for each program that requires grant support. For example, if you are planning a series of financial literacy workshops, develop a project description worksheet for the series. If you need to replace the computers, printers, hardware and software in your offices, that deserves its own worksheet.

The worksheet includes:

- Project name (working title)
- Contact person or team overseeing the project
- Proposed project (short, narrative format)
- Needs to be addressed/problems to be solved (narrative format)
- Relationship to larger projects or past projects
- Project budget, with brand names if possible
- Key words for research: geographic focus, areas of interest, target population, types of support



Once you have a worksheet completed, follow these steps for doing your research:

- Look for government and private sources
- Review background materials for each potential grantmaker
- Determine any questions you need to ask the funder
- Develop a script that you will use when contacting the funder
- Contact the funder via email or phone
- Build your grantseeking strategy for this project

As you begin your search, look for three distinct types of support: cash, donations of products and services, and technical assistance. Each type of giving can provide key leverage points in your overall strategy.

This research will generate questions on your part. Make note of these questions, so you don't have to go back and revisit each grantmaker later when you're preparing to contact them.

## Building a Grant Strategy

Adopting an overall grant strategy for each project or program that needs funding, including general operating funds, will help keep you on task. Remember that the best grant strategies are always fact-based. This is where that research comes into play. Strategic thinking, however, is based on assumptions. You'll make assumptions about who can give

you what and when, extrapolating from the solid facts behind your strategy.

Stay flexible in your thinking. Consider multiple alternatives and a range of scenarios. Your strategy must be adaptable. A denial will shift the strategy, just as an award will.

Build enough funding into your strategy to absorb any denials, so the total amount indicated in your strategy will always add up to more than the amount needed for a specific project.

## Creating Your Calendar

Each project description worksheet will have its own strategy identifying a set of grantmakers to whom you will apply. Each worksheet will also have its own calendar of tasks to be done to get that proposal submitted on time. Work backwards from the deadline date to create a work schedule that provides plenty of time to prepare each proposal.

Ensure the calendar highlights all important decision points or deadlines so that you're not scrambling to get essential items together at the last minute. I like to then combine individual calendars into one large Master Calendar posted on the wall to keep me on track throughout the year.

I teach a webinar called Building a Powerful Grants Strategy with much more detail. Check our online education offerings on GrantStation's homepage.

Cynthia Adams, President and CEO of GrantStation, has spent the past 40 years helping nonprofits raise the money needed for their good work. She opened GrantStation because grantseeking requires a thorough understanding of the variety and scope of grantmakers and sound knowledge of the philanthropic playing field. Her life's work has been to level that playing field, creating an opportunity for all nonprofit organizations to access the wealth of grant opportunities across the U.S. and throughout the world.  
www.grantstation.com

# Double Dividend Sustainability



There was a time when environmental sustainability practices were relegated to environmental organizations. Only green groups, the thinking went, had time to care about costly and difficult sustainability measures that distracted from other organizations' missions.

That time is over. Social benefit organizations of all sizes and flavors are embracing sustainable practices. Why? Because environmental sustainability and organizational sustainability are linked.

This is true for large and small sustainable practices. For example, at more than half of organizations recently surveyed, paper documents create headaches for workflow, collaboration, version control and auditing, not to mention the costs of paper and ink. Yet online document services are cheap (sometimes free!) and easy to use. Videoconference quality, options and cost have improved dramatically in recent years, allowing organizations to cut travel expenses and employees to work from home. Office cleaning products emit harmful chemicals that increase employee sick days and reduce productivity. Greener options are now available, often at comparable prices, especially when the savings from reduced absenteeism are factored in.

Do you own your own building or office space? Even more savings abound. Next-generation programmable thermostats cost about \$200 each, but save anywhere from \$25-\$41 per employee per year, without affecting comfort. A building energy audit can save \$170 per employee per year by identifying cost-effective ways to cut your

use. Better yet - make your own energy. The cost of solar photovoltaic (electricity) and solar thermal (hot water) systems has dropped dramatically. New financing options make these systems not just affordable, but profitable, even for small organizations. Many installers now offer no money down and loans with 0% interest.

The most important reason for organizations to care about sustainability, though, is more fundamental to their long-term existence: Millennials. In poll after poll, Millennials show strong support for environmental issues, including where they work. Since they will soon be more than half of the workforce, this matters. More than 80% want to work for organizations that care about their impact, and 75% say they would take a reduction in salary to work for a more responsible organization.

Many nonprofits will look at these figures and think, We already provide social benefit to the world - we're doing enough to attract their talent. But Millennials care as much about what happens inside the company as they do about what it does for the world. 64% will not accept a job from an organization that does not have significant corporate social responsibility policies. 60% are committed to implementing sustainability practices in their work. Nearly 90% want their employer

to provide hands-on activities in the workplace that support sustainability. An equal number want their bosses to share company progress and goals toward greater sustainability.

Many also expect their employee benefits to be green, too. Interest, and choice, for sustainably-minded investments are growing. Millennials are leading the charge to divest portfolios, including pensions and 403(b)s, from fossil fuels. And as Millennials choose bikes and buses and trains over cars, free parking is no longer the perk it used to be. Bike racks, transit subsidies and centrally located offices are. Human resource officers, take note.

Managers, too, should take heed. The biggest barrier Millennials report to implementing sustainable solutions at work isn't cost. It's the reluctance of their managers, who are often Baby Boomers. Listen to your employees. They'll repay you with greater loyalty, productivity and, ultimately, a more sustainable organization in every sense.

Are Millennials' green glasses a passing fad? Not likely. Post-Millennials (so-called Generation Z) report similar levels of sustainability concern. That includes their choice of employer. If organizations want to ensure long-term health as the generational balance shifts, embracing environmental sustainability must be part of their strategy.

Kyle Gracey is a nonprofit professional who focuses on Millennial issues. He served as the executive director of two social benefit organizations, and joined his first board of directors at age 24. He now serves on four nonprofit boards of directors, where he is the chair of three. Kyle is based in Pittsburgh. [kgracey@eswusa.org](mailto:kgracey@eswusa.org)



# Increasing Board Engagement through Better Meetings



As nonprofit leaders and advocates, we look forward to board meetings like we do to putting gas in the car. It's a necessary activity, but there about a dozen other things we'd rather be doing. Getting the leadership and board members together is obviously critical to sustaining the organization. So, why does it feel like such a hassle?

In the nonprofit world, boards provide strategic guidance, raise funds, and make connections. The issue many of us face when meeting with the board is an issue of disconnected judgment. Executive director, staff, and board member interaction can seem tedious and even messy at times - even under the best circumstances. At worst, the nonprofit team might resent prepping for weeks to entertain people they perceive to be well-meaning but ultimately disengaged know-it-alls.

In ideal situations, the nonprofit and the board members have an established relationship and enjoy mutual trust and respect for each other's roles. The board members maintain an ongoing awareness of nonprofit operations and strategic initiatives, and come to the meeting with questions and informed

recommendations. But an investment of time and energy on both sides of the relationship are needed to build this foundation.

To start, confirm that the nonprofit mission is clear. In most cases, this is

a straightforward exercise. In groups going through a significant change in their approach or population need, however, this mission might be a bit fuzzy. Bringing clarity to the purpose and function of the organization is a critical first step.

Second, ensure that the board members are clear on their roles and responsibilities. Setting expectations for their participation is best done before they join the board. Many nonprofits are getting more disciplined in this regard, but even many high-profile boards struggle with this essential step.

Next, because board members are with the nonprofit staff so infrequently, they often lack sufficient understanding of what normal organizational operations look like. The solution to this problem is to build an experiential component into the next board meeting. Here is an example of how you might do this.

1. When developing the board meeting agenda, set aside at least half a day to see and experience first-hand your nonprofit staff at work. Select a range of functions from serving the beneficiaries (if logistically possible) to finance and budgeting.
2. Mimic typical daily challenges to the greatest degree possible. Obviously, most staff, patients, or clients will behave differently when there is someone

unfamiliar around. Introduce the board member to anyone they meet and explain what is happening. Include a description of common, everyday challenges, and the solutions to those problems that have evolved over time.

3. Split board members up among the various functions you've selected.

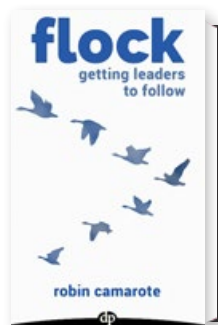
Create pairs of staff and board members that you believe will click with common interests or communication styles. The benefit is that the board member will be exposed to a passionate person who will naturally seize that opportunity to reinforce why the work is so important. They'll also see the strengths, weaknesses, and risks to the program up close.

When the experience is over, reserve space in the agenda for the board members to ask questions or share observations with each other. After seeing your nonprofit operations and initiatives firsthand, board members should immediately gain a greater understanding of how work is done. This increased knowledge will help them prepare more precise recommendations for your consideration. They also will likely be inspired to redouble their fundraising efforts after they see the great work and impact being made on the community, issue, or cause you serve.

Robin Camarote is a meeting facilitator and leadership team development consultant for federal and nonprofit organizations. In addition to consulting, she writes regularly for Inc.com and Government Executive on leadership and increasing your positive impact at work. She is the author of **Flock, Getting Leaders to Follow**, a best-selling book on organizational behavior.

Twitter: @RobinCamarote

Facebook: Robin Camarote writing



# Engaging Youth for Public Service



The next generation of workers is already being educated in schools across the country. Our challenge is to ensure they are receiving the education they need to become productive workers in the years to come. The best way to do that just might surprise you: engaging young people in public service.

When most people think about public service, they consider how it benefits the recipient. There's no doubt that communities are strengthened when schools are fixed up and more families can put food on the table. Yet, I think this overlooks one of the most important benefits of public service: the skills it offers to those who participate. A young person running their own service project gains leadership, organization, and engagement skills that will benefit them as they continue their education and enter the workforce. Public service not only helps communities, but it trains young people to succeed in their own lives.

This theory is backed up by a powerful new study by Marc Prensky, entitled *Unleashing the Power of our 21st-Century Kids*, which proposes a radical transformation in our education system. Prensky suggests that if you put kids together with real-world problems that they themselves perceive, the result is real world accomplishment, and they become good, empowered and effective world-improving people.

Prensky goes on to say, "Imagine if kids, after leaving K-12, entered college or a job recruiter's office not as they do today, with a transcript of grades and (at best) a vague idea of what they would like to accomplish, but rather with an actual résumé of accomplishments, with scores of projects completed over a K-12 career, in multiple areas and roles, and a clear idea of the kinds of roles and projects that suit them best and that excite their passions."

That is exactly what the Jefferson Awards Foundation (JAF) hopes to achieve with our youth programs. By having curricula focused on team building, leadership, community needs, project planning, fundraising, public speaking, tracking impact, marketing, media relations and scale, students are prepared to make a big impact in their communities and enter the workforce with the experience employers are looking for. Below are five of the core skills our students learn through public service. By cultivating and implementing these skills, students can become a powerful upcoming work force, which leads to long-term sustainability for our communities.

1. **Identifying Problems.** When students are presented with the opportunity to tackle the problems they are most passionate about solving, the vast majority identify community needs. Through public service, students hone their ability to identify problems by determining which issues are most pressing and which issues

they would be able to impact. Choosing to volunteer at a soup kitchen or lead a clothing drive means that a student has identified a problem, imagined a solution, and determined how much of their own time and resources to invest in solving that problem.

2. **Team Building.** In school, group assignments often lead to frustration. Yet teamwork is something that should be encouraged and valued. Through public service, students quickly learn how powerful teamwork can be. It becomes easily apparent that collecting ten cans of food for a local shelter is less productive than working with ten of your friends to collect ten cans each - and asking even more to join in the process. One of the most important skills to teach students is how to engage their peers to join them to multiply their impact.
3. **Project Planning.** It's often too hard for young people to gain project-planning experience. The next workforce will require people to not only come up with big ideas, but also implement those ideas. Students won't learn these skills through papers or tests, but through actionable projects they are able to organize and execute on their own. Public service offers a pathway for every young person, of any background, to take ownership of a service project from beginning to end. There's no better way to learn how to plan a project than by

running one on your own and seeing what works and where you fall short.

4. **Marketing.** Many young people have large ambitions. Not only do they have a problem they want to solve, but they want to solve that problem nationwide. They quickly learn that the best way to engage their peers, whether within their school or across the country, is through marketing. Students learn how to use social media as an organizational and motivational tool, and how to create videos, digital campaigns, and written descriptions that inspire others to get involved. They also learn the power of storytelling to garner support and grow their projects.

5. **Tracking Impact.** Measuring success is one of the most important skills students learn through public service, and it's the one they learn most naturally because young people like knowing how much they achieve. They track not only the number of items or the amount of money they collect, but also the number of lives they impact. In turn, they learn how to recognize when their projects need adjusting, and whether they are attacking the actual cause of a problem or merely an effect of it. At JAF, we train our students how to quantify all of their results and how to analyze their work. This allows them to improve their projects as they go on to generate the greatest impact.

One of my favorite examples of how public service has transformed young people is Patricia Manubay, a young woman who participated in two of our youth programs. When we first met Patricia, she was a shy high school student who lacked confidence in her own abilities. To put it in her own words, "I did not believe I had the power to lift anyone up, especially myself. Service changed that."

Patricia came to us with the idea of putting together care packages that encourage students to pursue their dreams. But she didn't know how to bring it all together. We taught her how to develop her idea, engage her peers, and implement her idea nationwide. With these skills, her project is now active in all 50 states, benefitting more than 350,000 lives. She is now a sophomore in college who will soon enter the workforce with project management experience gained entirely through public service.

But young people don't have to start their own nationwide project to benefit from activating public service. Simply participating

in a project offers many benefits including teamwork, organization, and engagement skills, as well as the knowledge that you can make a difference.

The benefits are particularly striking for at-risk youth. A national study by Opportunity Nation (Connecting Youth and Strengthening Communities) shows that civic engagement cuts youth disengagement by 50%. It motivates young people to stay in school, hold onto jobs and remain on a path beneficial to themselves and their community.

Our own faculty advisors report that learning our curriculum and engaging in service projects throughout the school-year yields an enormous benefit:

- 80% of our at-risk youth participants graduate high school
- 71% attend four-year colleges
- 83% feel better prepared for college and workforce
- 94% feel empowered to make a difference

There is widespread support for students to gain hands-on experience through public service. In fact, according to a 2016 national poll by Penn Schoen Berland (Youth Hold the Key: Building Your Workforce Today and in the Future), 90% of Americans believe community engagement delivers leadership and project management skills to young people.

Students should have every opportunity to receive an education that is fueled by their skills and interests, preparing them for the futures they, and our communities, deserve. I've found that public service is both a pathway to higher education and a fundamental tool for training young people to enter the workforce with the experience they need. By training young people to help others, we also train them to succeed themselves. Public service is essential for better education and career outcomes, and that's why I'm so committed to encouraging it.

Hillary Schafer was one of the highest-ranking women in the equity business but, after involvement with Hurricane Sandy relief, Hillary left the for-profit space and focused her energy and heart to elevating, celebrating and generating social impact. She is the Executive Director of the Jefferson Awards Foundation, an organization dedicated to empowering others to have maximum impact on the things they care about most.



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## Leadership Empowerment Symposium: Leadership Systems, Skills, and Strategies for Executives

Leadership is a culture not a training program. This Leadership Empowerment Symposium and Workshop is a one-day intensive program in Transformational Leadership as a culture creation, skill set, and system. Attendees are nonprofit Executive Directors/CEOs, Board Chairpersons, Pastors, Rabbis, Major Donors, Volunteer Coordinators, Program Managers, HR Directors, and other leaders in social benefit work as well as business leaders.

### This intensive session is interactive including the following:

- Content presentation
- Application exercises
- Discussions of topics and issues relevant to participants
- Problem solving - addressing actual issues of participants

### Take-Aways:

- **To inventory and upgrade leadership skills for**  
The executive  
The board  
The stakeholders
- **To define ways to empower and engage boards and stakeholders**
- **Learn how to connect engagement with strategy**
- **To develop a framework for strategic planning**  
To empower stakeholder engagement and create team synergy  
To clarify value for potential funders  
To identify sources of revenue  
To identify and upgrade organizational processes and systems
- **To learn tools and strategies for the following**  
Conducting Power-Packed Meetings  
Composing Goals that Work  
Defining ways to create more servant leaders in action

### The workshop includes the following modules: Transformational Leadership overview

- **Foundations - Vision, Mission, Goals:**  
Identifying Core Values and Guiding Principles  
Composing effective Goals and Action Plans  
Defining accountability mechanisms
- **Relationships - Building and Maintaining Effective Relationships**  
Building an active board  
Empowering staff  
Engaging volunteers
- **Systems - Building in Processes**  
Tips for Conducting Power-Packed Meetings  
Eliminating the Dysfunctional Annual Review  
Processes for hiring the best people
- **Balance - Managing Everything**  
Systems for time management  
Processes for managing multiple priorities  
Balancing self as a leader
- **Typical Issues Addressed**  
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*“As people learn emotional maturity the world becomes a better place, one family and organization at a time.”*

**Dr. Roberta Gilbert**  
Psychiatrist, Author,  
Specialist in Bowen Family  
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# Being Present and Accountable

## Family, Brain, Organization



Leaders who are connected in their families do better in their organizations than those who are not. We have seen this over and over in our Extraordinary Leadership Seminar. I have seen this so many times that I am sure it will someday be a scientific fact.

Like organizations, the community, and the world, families are living, growing and changing. How do we keep up with the changes?

One of the best ways to keep the brain flexible and able to change as needed is to stay in contact with one's family. The science of family, family systems theory, tells us to stay in contact with important relationships. I have been watching for years as leaders do – or do not – stay in contact with their families.

Families are always in flux. Someone is dying, having a baby, getting married, or something. In order to keep up with it all, the brain of every individual is always making changes. These changes involve new information and new relationships. Old ones pass and new ones develop. When one stays in contact with that big organism we call the family, the brain automatically takes it all in and makes adjustments. These adjustments, not only for the knowledge that someone new has been added or taken away, but also for learning the new relationships and how they will work, mean that our brains make fundamental changes. These changes, as we track our relationships better, stay with us.

Many social scientists who have studied the human brain believe that our brains developed as social brains: as humans congregated into

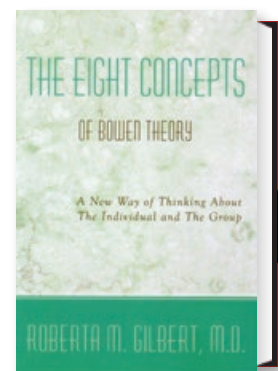
families, then clans, and then villages, long, long ago, the human brain grew in size. The frontal cerebrum, just behind the forehead, is larger than that of any of our close primate relatives. The large size may have been needed to deal with the social relationships we were developing. It is not much of a leap to see that, in the same way, the functioning as well as the size of the brain will be affected by social relationships. The most formative of all the social groups that any of us belong to is our family of origin. And the brain formation continues as we form our own nuclear families. Murray Bowen, in his theory about the family, saw it as a system that is greatly influenced by the emotional states of its members. He hypothesized that people who stayed in contact with their important relationship units would do better in life than those who did not. In fact, in the consulting room, he, and those of us since, have seen the prediction born out. As people get in touch with their families of origin and improve relationships within their present families, they drop symptoms, report greater inner calm and stability, and gain energy to go toward their goals.

Staying in touch involves, among other things, being present and accounted for at important family events. Weddings, funerals, and christenings have become the stuff of many absorbing stories as people tell of the connections they have made there.

As people are intentional and careful about staying in relationships with various people in their family, they begin to be looked upon as a family leader. People want to be around them. They want to know what they think.

This defines a high-level leader.

The abilities that the brain develops in these activities translate to leadership talent at work and elsewhere. It is not so much that we lead others, as it is managing ourselves in a way that others want to see what we are up to. So, getting in good contact with family members (some of whom may have been sadly neglected) becomes a little-known but highly efficient way toward becoming the kind of leader we would all like to be.



Dr. Roberta Gilbert, in addition to maintaining a private psychiatric practice, is a faculty member of the Bowen Center for the Study of the Family and the founder of the Center for the Study of Human Systems ([www.hsystems.org](http://www.hsystems.org)), author, and speaker. She works with business leaders, pastors, and therapists, particularly in Bowen family systems theory for individuals, families, and organizations.



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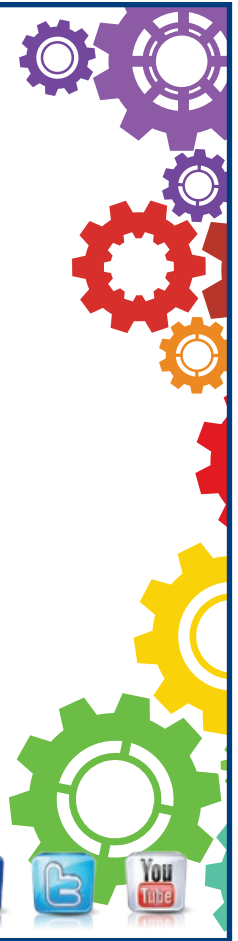
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## MAKE-A-WISH FOUNDATION

# Fairy Tales Still Come True

## An Interview with Frank Shankwitz



**F**rank Shankwitz founded Make-A-Wish in 1980. With a mission to grant the wishes of children with life-threatening medical conditions to enrich the human experience with hope, strength and joy, the organization now helps to serve children in nearly 50 countries on five continents through its 36 affiliates. Hugh Ballou, co-publisher of Nonprofit Performance Magazine, sat down with Frank to discuss the origin and continuing success of Make-A-Wish.

*Hugh Ballou:* Frank, give us some background about yourself. You were a police officer?

*Frank Shankwitz:* I was with the Arizona Department of Public Safety. I started as a highway patrol car officer and, when they started the motorcycle program, I rode motorcycles for 11 years. Then I worked as a detective in narcotics, sex crimes, political corruption, and eventually homicide, where I spent the majority of my career. I recently retired with 42 years of service.

*Ballou:* How did the vision for the Make-A-Wish Foundation come about?

*Shankwitz:* While I was riding motorcycles as a police officer, the television show CHiPs became very popular, especially with young children. I was on a ten-man squad, working the whole state of Arizona. A two-man team would be in one town for two weeks and then move to another town, wherever they needed us for big events, especially in tourist areas. Children

thought we looked like the guys on CHiPs, and we initially trained with the California Highway Patrol. During slow times we went to local grade schools and talked to the children about bicycle safety, which they couldn't care less about, but they had fun on the motorcycles. It was a great PR tool.

In 1978, I was involved in a high-speed chase with a drunk driver, and another drunk driver ran a stop sign. I hit him broadside at 80 mph and was pronounced dead at the scene. An off-duty emergency room nurse performed CPR and heart massage for four minutes and brought me back to life. It took six months to recover from that accident, but I kept wondering why I was spared. Was there a mission for me in life?

In 1980, I received a phone call from a fellow officer, Ron Cox, who had met a little boy named Chris. Chris was seven years old, and he had leukemia with only a couple weeks to live. His heroes were Paunch and John from CHiPs. Chris told his family and Ron, "When I grow up, I want to be a motorcycle officer just like Paunch and John on CHiPs." The family asked if there was anything that we could do that would cheer this little boy up. Ron knew that I had worked with children and told me that they had set up a special date for Chris with his doctors, his mother, and our commanders, flying Chris from his hospital in Scottsdale, Arizona, to our state police headquarters in Phoenix. Ron wanted me to be there with my motorcycle, since I'd worked with children before and I looked like the CHiPs

guys. I had no idea what to expect. This little boy had been on IVs. I thought paramedics were going to have to help him.

Instead, a little boy in red sneakers popped out the helicopter door and introduced himself. He gave me a high five, and asked to get on my motorcycle. He was fascinated with it. He had watched CHiPs so much that he knew every button and switch on that motorcycle. This is the siren, this is the red lights, this is the warning lights.

I kept watching Chris, thinking that he knows he has only a couple weeks to live, and he is running around like a typical seven-year-old. Then I started wondering what else we could do for him. That day, he became the first and only honorary highway patrol officer in the history of the Arizona Highway Patrol, complete with his own badge and certificate making him a full police officer. His doctor pronounced his vitals as good,

He said, "I want to be a motorcycle officer. How can I do that?" I said that it was a shame he didn't have a motorcycle, because we'd test him with traffic cones in the driveway. Chris ran into the house and rode out on a little battery-operated motorcycle that his mother had gotten for him in place of a wheelchair. Soon enough, he had on aviator sunglasses like the motorcycle officers wear, and he went through the test and passed. He was fascinated by the wings on my uniform, and asked when he could get his. I told him that I would order them right away and they would probably take a day or two.

Chris got to stay home again that day. The doctor came to the house and didn't understand it but, again, his vitals were good. I ordered the motorcycle wings, and I picked them up the next day. But by then, Chris was in the hospital in a coma, and probably not going to survive the day. I went to the hospital and, as I pinned the motorcycle wings on his

him a full police funeral. We were joined by Illinois State Police, county and city police, and Chris was buried in uniform. His gravestone reads, "Chris, Arizona Trooper."

But flying home, I started thinking: this little boy had a wish and we made it happen. Why can't we do that for other children? The idea for the Make-A-Wish Foundation was born at 36,000 feet.

*Ballou:* This wouldn't have happened if you had not done something. You got it done, influenced a huge number of people, and started this foundation, which is really a movement to honor those children who are terminally ill and have a wish.

When I had a camera store in St. Petersburg, Florida, some of my friends who were part of Make-A-Wish said there was a child dying who wanted to be a photographer. We made that happen. There was no question about whether we wanted to do it. We just wanted to know when.

Make-A-Wish has generated revenue in order to do good things. We tend to think of profits only as money, but there are other ways people benefit from this. What went on from there? You established this initiative while you had a full-time job with the police, right?

*Shankwitz:* Yes. I had an idea, but it took a lot of people to make it work. The most difficult thing in the beginning was finding people who believed in the same idea. Several of the officers and people who met Chris thought it would never work. The Arizona Corporation Commission requires a five-member board with a president, a vice president, and three other board members for a

foundation, and it took about two months to find four other people.

As you said, I was a full-time police officer, usually a vocation of 60 hours per week. This was before the days of the Internet. I spent a lot of off-duty time in the library researching how to start a nonprofit, but we finally figured it out. A friend who is an attorney, and another friend who is a CPA, helped me put it together. It only took six months to receive our 501(c)(3).



so he went home that night instead of back to the hospital. But we knew the highway patrolman needed a uniform, so two ladies at the local uniform shop spent all night making a custom uniform for Chris.

The next day, I led a procession of motorcycles and highway patrol cars to his home. The neighbors were wondering what was going on. Chris came running out, and we presented him with his uniform. Chris was ecstatic. He ran in, changed right away, and came strutting out with his uniform and the Smoky Bear hat that we gave him. He was proud as can be.

uniform which was hanging by his bed, Chris came out of the coma. He looked at me, looked at his uniform, and asked with a big smile on his face, "Am I an official motorcycle officer now?" I told him he was. I handed him his uniform, and he touched the wings, giggling a little bit, and showed them to his mother. A couple of hours later, he passed away. I like to think those wings helped carry him to heaven.

We had lost a fellow officer as far as we were concerned. Another officer and I went to the little town of Kewanee, Illinois, and gave



From the beginning, I wanted to base the foundation on accountability, integrity, and transparency. I wanted to make sure that every dollar that was donated went directly to the mission, so none of the board members received any type of salary, including myself, the first president and CEO. The media picked up on that: here is a foundation where they are not thinking about how to make a profit, but everything is going directly to the mission.

**Ballou:** In a nonprofit, you don't distribute the profit to the shareholders because you don't have any. It's really a tax-exempt charity. Nonprofits generate profit for the cause.

Many people give up because they can't easily find people who agree with their idea. Tenacity is needed to make it work. Everybody has an idea. Only three out of 100 people will do anything about the idea. Then 90% of those 3% fail because they are not persistent enough to actually follow through and not let other people rob them of their dream. You had people tell you it wouldn't work, but you knew it would. What conviction inside of you drove you to complete this?

**Shankwitz:** Our mutual friend, Greg Reid, taught me a word a few years ago: stickability. While I was putting the foundation together in Phoenix, I learned how many children in the children's hospital there had leukemia. In the 1980s, leukemia was a death sentence for children. I realized that there were other children out there who needed to have their wish granted. Unfortunately, starting the foundation was all about terminality, and the children did not survive. Fortunately, today about 70% of children survive leukemia and the majority of cancers that are life-threatening illnesses.

Our national board members came up with a great idea about 20 years ago to change our mission from terminal to life-threatening because, through the graces of God and modern medicine, more and more children were surviving. It was a great decision for the current management of the Make-A-Wish Foundation because that way they could impact a lot more children, granting a lot more wishes.

**Ballou:** Another good leadership principle is developing a consensus with your team, your board. The Make-A-Wish Foundation will supersede you for who knows how long; it will go on indefinitely because it is an idea that you have transformed into an institution which has sustainability. Are there chapters of Make-A-Wish around the world?

**Shankwitz:** Yes, there are now 62 national chapters and 36 international chapters on five continents. During our first year, we told our board members that someday we were going to be national and international. They all laughed at me, but I think I had the last laugh on that one.

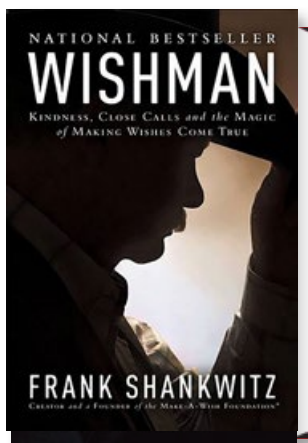
**Ballou:** I commend you for that. Leaders are people of influence, and you influenced that to happen by your power, your presence, and your stickability, continuing to make a difference in the world.

Bob Proctor says that he doesn't have the word retire in his vocabulary. A few years ago, he was asked when he was going to slow down. He said, "I am 77, and I have to speed up. I have more to do." You and I are in another phase. I am in my third career. I had my career as a merchant and as a conductor for 40 years. The last ten years I have been working as a leadership strategist, helping people launch their ideas and build strong teams and strong organizations as they build their skillset.

I commend you for your journey and not only for your wisdom but also your commitment to that passion. Make-A-Wish has generated money to continue doing its work, but the profit is people have benefited in many ways. You are in a new phase of your career. I heard a rumor that there is a book and a movie coming out.

**Shankwitz:** I'm so fortunate. This is my fourth career. My first career was in the Air Force. My second was at Motorola. My third was as a police officer for 42 years. When you retire, what do you do? There are not a lot of jobs for an ex-homicide detective. Greg Reid started me on a whole new career path with speaking five years ago. That led to Hollywood calling to say that they wanted to do a movie on my life, the movie *Wish Man*. The screenplay has been finalized and approved. Filming starts in April 2017. I am pretty

excited about all of that. I am flattered and humbled that they want to do this, but they have kept me involved the whole way. And I have had a lot of fun doing that.



My book *Wishman* is out. It is my personal journey from five years old to what helped me create the Make-A-Wish Foundation.

**Ballou:** What would you define as the most important leadership decision that you showed in this initiative?

**Shankwitz:** I realized in later years that I was more of a dictator than a

leader with our board members. We had so many far-flung ideas, but I demanded that we continue the mission we had established at the beginning. It must have been right because our original charter and by-laws are still in effect 36 years later. One of the biggest decisions we made is that nobody was being paid; we are all novices in this. It was a grassroots effort. We decided we had to start hiring professionals in the nonprofit world. As Greg Reid says, you hire the experts, and none of us are the experts. I was very good in my police career. Another person was very good in their career. But we were not experts in nonprofits. We first started to pay a salary when we hired those experts. I think that



was a super decision because the leaders have taken Make-A-Wish Foundation to one of the top children's charities in the world.

*Ballou:* You may say you were a dictator. I would say you were committed to the vision and the principles behind that, and you were not yielding on those principles. That is a strong leadership position, to be grounded in principles that are so important. Because you did that, that vision is still in place today. That is astounding. Were there times along the way when you wanted to give up?

*Shankwitz:* Yes, of course. I can't tell you how many times. I was working full-time as a police officer, and because of the money we needed initially - fortunately police officers can get a lot of off-duty work in security and as bodyguards - I took all of the jobs

that I could, to put my personal money into the foundation. I was working 70-80 hours a week, and I would say, "I can't do this anymore." One of our board members would say, "Frank, we have just identified another child. We need to give this wish to them." That would give me the energy to keep it going.

*Ballou:* You payed attention. You demonstrated that you were alert. You surrounded yourself with competent people, maybe even people who are better than you, so this thing went where you wanted it to go.

*Shankwitz:* Definitely. We hired the experts, people who knew the nonprofit industry, people who had the training and the background, and they also had multiple contacts. That is something we look for in establishing not only our following presidents and CEOs, but also our board members: that Rolodex they could contact.

*Ballou:* That is a key point: surround yourself with competent people who have the contacts. Be very clear on what your ask is. You have generated the profit for this nonprofit, the profit that runs this motorcycle which is the engine that provides for these children. This has been a very inspiring story.

Do you have a parting thought for people who have an idea, who have downloaded a vision from somewhere, who have been given a calling to do something? Is there a tip or a challenge or an ending wish that you would give these people who have an idea?

*Shankwitz:* Never give up on it. Stick with what you want. Keep researching. Don't give up. I don't know how many people have a dream, but just don't follow through. Follow through takes time. There is no such thing as failure.

There are 1.2 million nonprofits in the United States, and I encourage anybody who wants to get involved in a nonprofit to research [www.charitynavigator.org/](http://www.charitynavigator.org/). They are the watchdog for all nonprofits. They will tell you where the money is actually going, to the mission or some CEO's pocket.

Anybody can be a hero. Being a hero means you can somehow give back to the community. It doesn't have to be in dollars. It can be in time or any kind of donations or just in support. Everyone can be a hero.

Frank Shankwitz was a co-founder of the Make-A-Wish Foundation in 1980. A wish is now being granted somewhere in the world on average every 38 minutes. Frank continues to work with Make-A-Wish as a Wish Ambassador and keynote speaker at fundraising events for chapters throughout the United States. Frank is the recipient of multiple awards, has been featured in many publications, and is the co-author of two books. [wish.org](http://wish.org)





# Relieve Stress the Koala Bear Way



When it comes to productivity, we often let the stress of things that are out of our control derail us, producing additional stress. This can turn into a downward spiral that is difficult to reverse. As an Extreme Focus™ Certified Mental Performance Coach, I help people manage this kind of stress so that ultimate performance is achieved.

In our coaching methods, we use animal instincts to trigger right behavior for maximum performance. The koala bear represents maintaining composure and control, a key component to effectively managing stressful situations. Koala bears never get flustered. They take things one step at a time.

Our koala bear is named OHWEL™. This reminds us that in challenging times, particularly where things appear to be outside our control, we can look at the situation and say “Oh well” or we can throw ourselves into a negative headspace and say “Oh hell.” Remember that it’s not the things that happen to us that define us, but rather how we handle them. Saying “Oh well” may not solve the problem right away, but it puts you into position to solve the problem. On the flip side, if you say “Oh hell,” things tend to continue going south, and the negative energy you add prevents your moving forward.

It’s important to remember that whatever stressful situations arise are an opportunity for learning and growth. With a proper mindset, you can get into the practice of enjoying the battle of your day-to-day experiences. Your perspective, in large part, determines your success, and you can shift your attitude to see the positive that can come from any situation or circumstance. On the journey toward success, you’ll undoubtedly come upon

detours that you need to navigate, but you can learn to maneuver around these obstacles to get you back on the main pathway.

It’s the lens through which you view your circumstances that determines your success. Glenn Llopis, contributing writer for Forbes, shares the following as it relates to leadership and maintaining composure under pressure:

The 21st century leader sees adversity through the lens of opportunity. Rather than panic, a leader with composure takes a step back and begins to connect the dots of opportunity within adverse circumstances. These types of leaders quickly detect the causes of adversity and solve for them immediately. They then enable the opportunities previously unseen that could have avoided the adversity to begin with. Many times crisis results when composure is missing.

Llopis also shared seven tips for maintaining control and composure during pressure-packed moments:

1. Don’t allow your emotions to get in the way
2. Don’t take things personally
3. Keep a positive mental attitude
4. Remain fearless
5. Respond decisively
6. Take accountability
7. Act like you’ve been there before

This is not new thinking. Marcus Aurelius, Roman Emperor in 161-180, said “You have

power over your mind - not outside events. Realize this, and you will find strength.”

### Put this into practice

Think of a time when you lost your composure in a pressure situation, and answer the following:

- Describe the situation in detail. Determine which parts of the situation were outside your control.
- How did you respond to the circumstances that were not within your control?
- What could you have done differently to impact the outcome of the challenge?
- What did you learn from this experience?

Now think about a situation that you are facing in the near future.

- What is your plan for effectively managing this challenge?
- What three intentions do you have for the outcome?
- How can you prepare yourself personally for these circumstances?

We can’t always change our conditions, but we can certainly change our attitude about our conditions. When you have this mindset and practice it every chance you get, you can find blessings within the challenges you face. This will help reduce your stress level when you find yourself in a pressure situation and will allow you to better manage it.

Enjoy the journey. Enjoy the battle.

Betsy Westhafer is the founder of ActionMasters Network. She is an Extreme Focus Certified Mental Performance Coach and serves as the Editor-in-Chief of **Extreme Focus Magazine**.

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# Approaching Sustainability at a Public STEM School



As for many nonprofits, the challenges and opportunities of long-term sustainability are a top priority for the Dayton Regional STEM School (DRSS). Due to the importance, our leadership team and Board of Trustees actively take steps to ensure that we remain open and continue to grow.

To fully appreciate our sustainability efforts, it's important to understand how our organization differs from more traditional school districts. While it is a nonprofit, DRSS is also an independent, public STEM school. Our mission is to prepare students with the skills necessary to compete in the global economy while nurturing the same enthusiasm for discovery, invention, and application that launched the vision for powered flight. The school is in its eighth year of operation, currently serves 640 students in grades 6-12, and the students represent eight counties and 35 school districts. The school is not tied to another district, so it is recognized as its own district by the State of Ohio.

As a public school, our operating revenue comes from the state in the form of per-pupil funding. While that funding currently helps to sustain operations, the funding will eventually level off as the school reaches its maximum target enrollment of 700 students. Faced with this future funding revenue stagnation, we must focus on making intentional, strategic decisions to ensure our sustainability. That is why we have a multi-pronged approach to identifying and pursuing additional sources of revenue.

One of the revenue channels is fundraising. While many public schools have fundraising efforts, we have a formal program. Roughly three years ago, the school recognized that in order to bring in additional operating support and prepare for capital improvements to the facility and grounds, it needed to invest in a development program. In 2015, they hired me as the full-time director of development to lead the effort. I work closely with the administration and board to identify funding priorities and determine fundraising methods. The strategy includes finding steady streams of predictable operating support through fundraising, grants, and a major gifts program, all of which help to cultivate future donations to transform the school. Additionally, we are in the midst of developing a master facility and grounds plan, which will help cast a clear campus vision that can be shared with potential funders.

One part of our new fundraising program is the annual campaign, which sets the stage for yearly operating support, develops a pipeline of financial supporters, and creates a culture of giving at the school. In the fall of 2016, we conducted the first community-wide annual campaign in the school's history. We made the case for support and asked all of our stakeholders - parents, partners, volunteers, staff, board, and alumni - to participate and invest in the school's long-term success. The goal for the campaign was \$25,000 which we surpassed by December.

In addition, we recognize that creating awareness of a more sustainable state funding model is key to long-term sustainability. To do so, we make an intentional effort to communicate the school's educational successes and funding challenges to state agencies and elected officials. This state-wide strategy includes regular collaboration with other independent STEM schools in Ohio which are funded in the same manner. The schools work with one another to share best practices in education and, as a group, we combine efforts to advance STEM education and strengthen our case for independent STEM school funding across the state.

Like many nonprofits, our school dedicates time and energy to sustainability because we are mission driven and focused on serving our stakeholders and community. By approaching sustainability from multiple angles, we open opportunities to increase support from our stakeholders, regional and national grant funders, and the State of Ohio. Successfully doing so will allow us to continually provide an exceptional educational experience to students.

Sara Collins, Director of Development for Dayton Regional STEM School and on the advisory board for the Regional STEM Collective, has more than 15 years' experience in community engagement, public relations, and fundraising, mainly for nonprofit organizations. She is a member of Leadership Dayton's Class of 2011, and Dayton Business Journal's Forty Under 40 Class of 2011.

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# Beyond One and Done

## Sustainable Diversity and Inclusion



The majority of children born in 2011 were children of color, born into a world that less than 50 years ago granted their parents equality on paper. But non-whites are born to a world of intersecting oppressions that will, most likely, greet them with lower pay, more surveillance, harsher punitive assessments for actual and perceived infractions, and limited health and educational outcomes. The majority of children born in 2011 were born into a world that has built a legacy of racial and gender oppression that, in practice, holds more weight than the U.S. Constitution. If the legacy of disparate outcomes outweighs the power of the Constitution, then intentional and collective efforts are the most viable recourse. Otherwise, we run the risk of reinventing apartheid.

Many businesses and organizations have responded to the need for diversity and inclusion through diversity training. These trainings have often adopted the perspective of benevolence without introspection. Simply, the call to action has been understanding and acceptance. While well intended, this perspective is short sighted. A lack of diversity does not happen through the efforts of those who have historically been excluded. A lack of diversity in professional and educational settings is the result of a legacy of discrimination. Therefore, diversity efforts should seek to include the historically excluded, while recognizing and minimizing practices and policies that are the source of exclusion.

Training must recognize ways in which bias may be imbedded in recruitment, hiring,

promotion and cultural environments. Modules for implicit bias have been relatively successful in meeting this objective. Unfortunately, training has traditionally stopped at the point of recognizing that a hypothetical problem may exist, rather than creating the analytical tools to recognize existing bias, dismantle policy and practices that contribute to exclusion, and create intentional efforts to cultivate diversity and create an inclusive culture. This necessary and comprehensive objective is not something that can be done in a single session. The one and done model for diversity and inclusion training is ineffective and is only capable of meeting self-fulfilling objectives.

To be effective, diversity and inclusion must exist within a strategic plan and therefore be sustainable. Processes that engage organizational growth, expand networks, and extend the reach into a potential hiring pool or client base, must also consider diversity and inclusion. To recruit diversity and practice inclusion requires the building of capacity to cultivate creative strategies to bring in talent, as well as capacity building to cultivate an inclusive environment. These processes require steps that have to be generated with consideration to the current work environment. This means that strategic plans must be willing to take risks and invest in things that may not seem to have tangible benefits.

What does sustainable diversity and inclusion look like? There needs to be context as to its importance by considering what is at stake if it does not happen. That context can then be used to develop initial training similar to implicit bias. From that point, organizational structure and

processes must be designed and exercised with the intention to create a diverse population and inclusive environment. This transformational stage includes training that builds capacity beyond initial training to achieve explicit benchmarks. If phase 1 training recognizes implicit bias, phase 2 may identify exclusionary practices and processes. While those are reflective, phase 3 must be corrective in implementing diversity and inclusion standards into a strategic plan.

After training leads to the articulation of a strategic plan, iteration of the above-mentioned process will lead to sustainability. Once standards are achieved, new standards must be articulated in a way that transcends the original mission. If you are successful with recruitment and creating an inclusive environment, that will create new opportunities to build relationships outside of the existing sphere of influence, share knowledge, and expand the original mission. This is what sustainable diversity and inclusion looks like: it is constantly evolving.

Devon Lee is a Ph.D. candidate in the Department of Sociology, specializing in Africana Studies at Virginia Tech. His research studies the historical development of Pan-Africanism in Belize and current realities grassroots organizations with similar principles face. As an Africana Scholar, Devon practices scholar activism and reciprocity by working closely with grassroots organizations.

# Your Service Club's Sacred Duty to Your Community



Service organizations are an important part of the fabric of society around the world. Lions, Rotarians, Shriners, and many others quietly provide community service and humanitarian aid on an impressive scale. The sustainability of that goodness is threatened, however, by stagnant or declining, and aging, membership.

There are three dimensions of sustainability: service, membership and public image. These must all be vibrant for a club to prosper. International organizations will do only as well as their individual clubs do collectively.

In virtually every American city, you'll find parks, schools and community programs that are largely or entirely funded and operated by service organizations like the Masons, Kiwanis and Elks. Pull those clubs out of a community and much of what we think of as defining the community is gone. Leaders of service organizations have a sacred responsibility to their communities.

The heart of a service organization is in service. Increasing social events may not hurt membership but there is little evidence that people join service organizations just to socialize. Add service to your socials and don't forget to socialize at your service projects, which should often end with cold beverages and relaxation.

As a club's membership declines and ages, it may threaten the organization's ability to give service. The financial resources of a club, hall or lodge come principally from its members. While international foundations may provide funding for projects, that money is often tied to the contributions of the club members. Putting increasing financial burdens on a

smaller group of people runs the risk of accelerating membership declines.

"Times, they are a-changing," sang Dylan, and nowhere is that more apparent than in the media. Many local papers are owned by conglomerates. Those that aren't compete against them. Classified ad dollars ended with Craigslist, crushing news budgets. Most papers don't have anyone to send to your club meeting. It is harder than ever for your club to make the news.

There is a tremendous synergy among the dimensions of sustainability. Here are three strategies for strengthening your club.

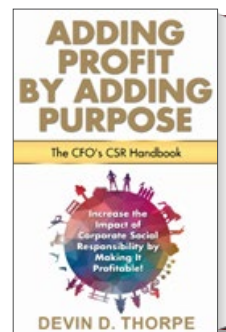
First, stop measuring things that don't matter and measure the things that do. How important is measuring attendance at regular meetings? Instead, measure the impact of your work in meaningful ways. Measuring impact rather than activity starts incrementally. Over time, you can learn to measure your impact on high school graduation, crime rates in your community, healthy deliveries in a village in Guatemala where you support a pre-natal clinic. Start today by measuring the things that get closer to the real impact you want to have.

Second, since Millennials are less prone to joining organiza-

tions, are leaving organized religion, and are distancing themselves from party politics, you need to develop specific strategies to appeal to them. One thing is certain: if you don't plan to appeal to them, you won't.

Third, although traditional media are more difficult to attract, it has never been easier to produce your own media. Create a club blog and post photos and stories of every activity, especially of every service project. Share every blog post via social media, both from club accounts and personal accounts. Encourage every member of your club to like your Facebook page, share the page's posts, and post their own updates and photos from club activities.

An article buried in the newspaper may be read by only a few thousand people. If 20 club members share a photo from an event on both Twitter and Facebook, the total number of people reached with those posts could far exceed the number reading about the same event in the paper. And it could have more impact because the people seeing the social media posts know your members and know exactly how to get in touch to ask how they can be a part of this.



Devin Thorpe focuses on helping those doing good in the world. Author, advisor, Forbes contributor, keynote speaker, emcee, and trainer, Devin's mission is to solve some of the world's biggest problems before 2045 by identifying and championing the work of experts who have created credible plans and programs to end them once and for all. His latest book is **Adding Profit by Adding Purpose**.  
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# Clean Water for All

## Waterkeeper Alliance



Without water, there is no life. Without clean water, there is no healthy life. Water is the resource that is most taken advantage of and fought over. Since the population and technological booms of the 20th century, pollution from manufacturing, farming, mining, energy production and human waste has taken a toll on water supplies. Climate change impacts are shrinking those supplies even farther and have increased competition for freshwater sources. Water is the next great global crisis. It will take innovative solutions and an army of dedicated individuals to put an end to this path of destruction and preserve our precious water resources and planet. Environmental advocate Bill McKibben says that we need a movement with “thousands of leaders in thousands of places, connected like the solar panels on the roofs of an entire planet.”

Waterkeeper Alliance is a global network of grassroots leaders protecting everyone’s right to drinkable, fishable, and swimmable water. Since 1966 when commercial and recreational fishermen mobilized to reclaim the Hudson River from the hands of polluters, the Hudson, despite continued challenges and threats, has become an icon of ecosystem revitalization. Riverkeeper’s success spurred an explosive growth of similar grassroots organizations around the world. Founded in 1999 to support those groups, Waterkeeper Alliance is made up of more than 300 Waterkeeper organizations and affiliates, protecting waterways in 34 countries.

While other nonprofit organizations work effectively on water issues, Waterkeeper Alliance is unique in combining a singular focus on clean water with an action-oriented model connecting grassroots activists to a powerful global network.

### Growing a Global Network of Grassroots Leaders

Waterkeepers, ordinary citizens who courageously work full-time to ensure drinkable, fishable and swimmable water for their communities, are the core of our movement. Waterkeeper Alliance superpowers their work and turns individual local efforts into a unified, global entity. Anyone carrying the Waterkeeper name must meet the Alliance’s high standards for ethics, conduct and effectiveness. Waterkeepers patrol waters, hold polluters accountable, advocate for protection of clean water, strengthen legal protections, and raise public awareness about threats to local waters to increase pressure for action.

Waterkeepers in Australia, Bangladesh, Chile, China, Colombia, India, Iraq, Kenya, Nepal, Sweden, Togo, the United Kingdom, and more patrol and protect nearly 2.5 million square miles of watersheds. They are the boots on the ground making sure that water is protected and that communities are safe.

### Employing a Unique Model to Address our Most Critical Water Issues

Contaminated water sickens and kills. Pollution and shrinking access to water is alarming:

- 40% of U.S. waterways are not safe for swimming or fishing, 60% of China's groundwater is polluted, and 85% of Bangladesh has contaminated groundwater.
- More people die from unsafe water annually than from violence, including war.
- The U.N. estimates that 48 nations will face freshwater scarcity within 10 years.

Current resources and efforts to solve these issues are woefully inadequate. As municipalities, regions, and nations increasingly grapple with determining and implementing solutions, other entities, often including industrial forces, aggressively and sometimes illegally undermine the basic human right to clean water.

The U.S. Clean Water Act would ensure clean water for drinking, fishing, and swimming if it were implemented and enforced. A common theme around the world is the failure to implement and enforce the meaning and spirit of laws protecting waterways. Corruption is the usual reason behind this failure. Waterkeepers give meaning and force to these laws. When government fails to enforce the laws designed to protect us, Waterkeepers are often the last line of defense.

### Leading with Best Practices

Waterkeeper Alliance has a 13-person Board of Directors and a staff of 25 full-time employees, seasonal interns, and volunteers. The Alliance is organized into five departments with individual directors: Legal & Advocacy, Support (training, collaboration, recruitment), Communications, Development (fundraising, strategic partnerships, strategic planning), and Operations.

We measure our progress by utilizing a three-year strategic plan to work toward our long-term mission and vision. The goals from our strategic plan, which are each supported by clear metrics, are detailed in annual work plans for each department. These plans are reviewed monthly for progress and challenges, and reported at Board meetings. The Board uses a defined, measurable effectiveness assessment policy to evaluate the success and impact of our programs in fulfilling the organization's goals and objectives.

Our sound fiscal policies have brought 4-Star Charity Navigator status, GuideStar Platinum Status, Top-Rated status from Charity Watch, and we have met the highest



standards of the Wise Giving Alliance of the Better Business Bureau, assuring donors that we are effective stewards of their donations. This is key in attracting and retaining supporters.

### A Proven Record of Success

Waterkeeper Alliance brings economies of scale and experience to local clean water battles, providing expert training and capacity building, legal and scientific expertise, communications support and broad-based campaigns. Around the world, our Waterkeepers and staff work to achieve lasting impact.

Examples of Waterkeepers in action:

- Waterkeepers in North Carolina helped achieve a \$102 million fine against Duke Energy and a \$3 billion cleanup of its coal ash sites;
- Waterkeepers in China developed a protocol for resolving water problems outside the courts to improve water quality more quickly;
- The Maule Itata Coastkeeper in Chile halted construction of the Los Robles coal-fired power plant;
- Waterkeepers in California settled a \$2 billion lawsuit against the City of Los Angeles after years of sewage spills polluted the Santa Monica bay, requiring the City to replace 488 miles of sewer lines, clean 2800 miles of sewers annually and pay \$8.5 million to projects dedicated to improving local water quality.

The best proof of our success comes from our Waterkeepers' community achievements. In 2005, I went to Senegal, West Africa, to meet with villagers in Hann Bay, the most polluted place I had ever been, about starting a Waterkeeper there. This is a fishing village of 40,000 people with no sanitation service, and the villagers haven't been able to fish in the bay for more than 25 years.

The village's football club ASC Yarakh actively educated villagers about hygiene, HIV/AIDS, and other topics; they also dreamed of restoring the bay's glory. One of

the club members had lived in Toronto and learned about Lake Ontario Waterkeeper and Petitcodiac Riverkeeper, and realized that Hann Bay needed a Waterkeeper. I told the amazing group of individuals that I wasn't sure we could support their work, as we did not have anyone on staff who spoke Wolof or French and they would be the only Waterkeeper on the African continent. But their leader, Mbacke Seck said, "You have an international brand, you have a model that works, I will learn English and we will come to the Waterkeeper conference every year to learn from others and bring home to apply what we learn." So we embarked on the journey together. Shortly thereafter, we helped them secure a \$10,000 donation to turn their office into an internet cafe, making their office a village hub, giving them a voice to the outside world, and creating a sustainable source of revenue.

Mbacke learned fluent English and they came to our Annual Conference every year starting in 2006. In 2014, Hann Baykeeper convinced the Government of Senegal, the French Development Agency and the European Investment Bank to commit \$68 million to fund a cleanup of Hann Bay. Their work inspired the creation of more Waterkeepers in West Africa. In 2015, their ongoing work and partnership with key local advocates led to the suspension of construction of two coal-fired power plants in their region. Hann Baykeeper has been a leader in the fight against the pollution that has long impoverished fishermen, sickened villagers, and fouled Hann Bay's beaches.

These successes happen every day because of dedicated Waterkeepers working on the front lines to save and protect their waterways. Our ultimate goal is to ensure that all of the Earth's habitable watersheds are protected, and we endeavor to provide Waterkeepers with the tools that will enable them to be the best and brightest advocates on the planet.

Marc Yaggi is Executive Director of Waterkeeper Alliance, the largest and fastest growing nonprofit solely focused on clean water. Marc has dedicated his entire career to environmental advocacy and has been instrumental in expanding the Waterkeeper movement around the world. He works daily to raise public awareness about the issues central to Waterkeeper Alliance's vision for drinkable, fishable, swimmable water worldwide. [waterkeeper.org](http://waterkeeper.org)

# Sustaining Relevance

## Survive Versus Thrive



Organizations across the globe are facing a major threat to their survival and a direct impediment to their ability to accelerate and thrive: the equation of sustainability.

Sustainability has for decades been owned by the linear thinking positions: analytics, finance, accounting, engineering, operations, administration, etc. Sustainability is a 360-degree conversation and application: each business unit, including the entire C-suite, has an ownership stake in understanding and implementing sustainability strategies and behaviors. Sustainability is a universal issue and is far more reaching and impactful on organizations and human capital than most realize.

Survival mentality in our marketplace serves as a cancer to sustainability. Business annals are littered with organizations and individuals that embraced survival mentality and no longer exist. Conversely, the annals also boast many great organizations in the private sector and nonprofit space that are achievers and winners.

In 1971, the United States Junior Chamber of Commerce (Jaycees) had more than one million members, as a thriving sustainable organization. Today, the US Jaycees boast fewer than 30,000 members and are knocking on death's doorstep of defeatism. Their mission statement from nearly 100 years ago is still 100% viable, but decades

of flawed execution have derailed them. In the past decade, the United Methodist Church has lost more than one million members from their local-level leadership positions because of survival mentality and not addressing a progressive forward-focused thrive sustainability mindset.

The concept of sustainability has been bastardized in business conversation of late as applied only when discussing topics such as conservation, ecology, alternative energy, or global warming; this is a gross misrepresentation of the concept. In that context, sustainability may be a marketing gambit to attract people to emotionally-charged narratives and business endeavors that would otherwise not be profitable or relevant. It makes people feel good to say they are engaged in sustainable projects.

Organizational sustainability is a universal and should be considered, benchmarked and applied in many ways. Here are a few, albeit not conclusive, non-traditional lenses to look through when considering the matter of sustainability.

### **Sustainability through Values-Vision-Mission Statements.**

These statements are the GPS from which all other factors are born for thriving organizations. It starts with a deep reflection on the organization's core stakeholders' personal values and how those evolve into

the organization's value system. Values drive the vision of the individual and organization and are typically transferred into the public mission statement. Every endeavor, deliverable, decision, and all human capital moves should be aligned into this for survival, meeting minimum business standards to stay viable and determining performance standards that excel beyond to attain a thriving state.

### **Sustainability through Viable Evolving Real-Time Deliverables.**

Keep people focused on a short-term world perspective with continuing relevance when the long-term matters are paramount for sustainability. To be sustainable, organizations must embrace a culture and attitude of agility to ensure that what they engage in with business practices, deliverables, etc., serve a real market need. Mindsets must be respectfully challenged at all times and with every incident. Conversely, an organization that is executing action plans and deliverables doesn't need to change, if change would not move it to a thriving state.

Survival sustainability is predicated upon the analytics of your present deliverables as an organization or nonprofit, measured against the demographics you serve, what really is profitable, and what your organization should remain connected to and what should be spun-off to remain viable. Once this is done and monitoring systems and processes



are in place for constant data feedback, then the organization's C-suite must ensure tomorrow's survival by recognizing what the market will tolerate and need in the immediate, intermediate, and long-term future, and determine ways to be market-ready as those needs appear.

With a thriving sustainability mentality, organizations, management, and boards will know and create the future so as to actually lead the market into thriving sustainability.

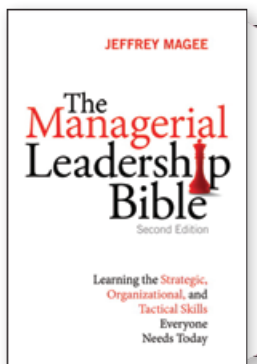
### **Sustainability through Trajectory Codes.**

Blend involved participants and their personal/professional values, goals, aspirations, and needs (on immediate, intermediate and long-term time frames), their Trajectory Code® (TC). This must be in alignment with the organization's TC gains, buy-in, alignment, and thriving energies. When the constituents' trajectories align, then organizations operate from a baseline of sustainable trust and organizations will experience daily thriving realities and advances. The organization's TC must be supported by every business practice within that organization and by all human capital. Thriving organizations derail and fight daily to merely survive when these TCs are not aligned, and personal pet agendas and egos get in the way.

### **Sustainability through Human Capital.**

Misaligned TCs must be set aside if organizations will truly be able to attract the best human capital and be able to execute the best practices and be sustainable. Organizations that go beyond mere survival mode have one guaranteed variable in play: they have the right human capital in the right place at the right time, and endeavor to cultivate a strong human capital bench two to three levels inward or downward!

Human capital involves a deep understanding of a wide cross-section of diversity drivers.



Whether understanding and applying generational diversity as an asset mentality, or culture imprinting on individuals and within the organization, the sub-entities within organizations, as well as how other factors of ethnicity, religion, life-style, social-economic drivers, etc., impact sustainability.

### **Sustainability through E-Business and Traditional Business.**

Whether your organization operates within the internet or the traditional brick-and-mortar world, sustainability is the same. The difference is that in the e-world you must be even more responsive and agile to factors that impact sustainability. This allows proactive actions in addressing immediate needs (survival sustainability endeavors) and allows a pathway for organizations and individuals to evolve forward (thriving sustainability endeavors). Having connectivity into valued identified constituents, both internally and externally, will provide clear TCs for any organization in any situation, to ensure thriving sustainable actions, commitments, deliverables and energies.

### **Sustainability through Economics.**

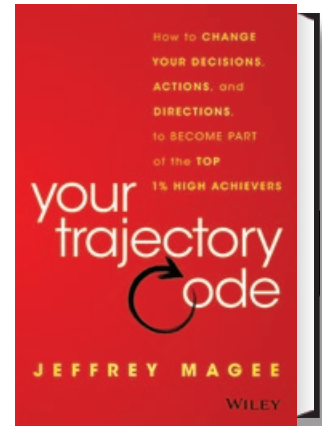
Cash flow management will ensure sustainable thriving business practices. Understanding scalability dictates whether an organization can evolve into thriving states such as how accounts receivable, accounts payable, compensation and benefits, inventory control, shared partnership resources, budgeting and planning, investment in all capital areas, etc., are managed.

### **Sustainability through Next Generation ... Evolve or Die.**

From the boardroom to the C-suite, and from the frontline to the customer, always have a forward focused initiative on what the next generation deliverables must be, for the programs and policies that foster thriving energies, to a full-scale approach to developing your human capital upwards, the never ending capacity to always be looking outward for what you can acquire, partner, and create as next evolution realities.

### **Sustainability through Engaged C-Suite Architecture.**

First, your board must be aligned with your management for sustainability to be individually owned. As you establish the architecture layout of your C-suite (CEO, CFO, COO, CIT, CLO, etc.), whether on paper for future implementation or in real-time, you should have a dotted line from a



management member to a member of the board with matching experience, so as to have an accountability conduit between management and the board. Ensure that you don't end up with multiple redundancies on the board or a C-suite occupant with no advisory-accountability board connection.

Second, each management-board pair should be challenged to evaluate and stress test present sustainability factors within their respective enterprises for survival and then be pushed to consider action for thriving sustainability opportunities!

If your thinking or actions within an organization are driven by stakeholders who fight you over what you do to survive each day, then you'll be limiting your possible reality. These people and this thinking are the factors that will challenge thriving sustainability. Sustainability relevance within your organization should no longer be one of unspoken shame of survival versus embracing the thrive mentality!

Jeff Magee, CMC, CBE, PDM, CSP, accelerates organizations forward through his Leadership Academy Of Excellence™ Series, keynotes and performance based coaching. Jeff is the Group Publisher/Editor-in-Chief of **PERFORMANCE360 Magazine™** ([www.ProfessionalPerformanceMagazine.com](http://www.ProfessionalPerformanceMagazine.com)), Editor of *Performance Execution and Performance Driven Selling™* Blogs, former nationally syndicated Radio Talk Show Host ([www.CatalystBusinessRadion.com](http://www.CatalystBusinessRadion.com)), as well as the author of 23 books including best-sellers **The Managerial-Leadership Bible**, Revised Edition, **Your Trajectory Code**, **Performance Execution**, and **The Sales Training Handbook**. He is also a columnist and highly sought motivational leadership speaker. The recipient of the United States Junior Chamber's Ten Outstanding Young American's (TOYA) Award and the United States National GUARD's Total Victory Team Medal for civilian contribution to the Armed Services. [DrJeffSpeaks@aol.com](mailto:DrJeffSpeaks@aol.com)

## Starting Sustainably



In the business incubator world, the prevailing framework is the Lean Startup proposed by Eric Ries in 2008, which focuses on understanding the needs of your customers to avoid investing valuable time designing features or services they do not want. Based on lean manufacturing principles, the intent is to eliminate wasteful practices during the development phase in order to have a better chance of success without requiring large amounts of outside funding, elaborate business plans or the perfect product. This framework helps startups focus on developing a scalable, repeatable business model.

All too often in the nonprofit world, we operate from the mindset of a cause without taking into account the business model. There's a reason for this phrase: Your 501(c)(3) designation is a tax status, not a business strategy. Helping military veterans is one of the biggest causes out there with the growing recognition that there are many needs to meet. With that in mind, we were determined to develop Veterans Recovery Resources with a focus on a sustainable business model from the outset to help veterans with substance abuse issues not only recover, but thrive over a lifetime. We understood that if our business model was not sustainable, our cause would be irrelevant.

### Understanding Our Customers

In understanding our customers, Veterans Recovery Resources had a head start, because we are veterans and have lived it. The idea for Veterans Recovery Resources came to me through time and experience. I am a combat veteran of Operation Desert Shield/Storm (1990-91), Kosovo (2005-06) and Kuwait (2015). I also have 12 years as an intelligence analyst in the U.S. Marine Corps Reserve and over 18 years as a Medical Service Corps Officer in the U.S. Army Reserve, including an eighteen month tour at the Pentagon in the Office of the Surgeon General (2009-10). I have walked in the shoes of veterans and those in recovery over the last 30 years. I have experienced the challenges facing veterans in receiving the timely and quality care they need, as well as the community fellowship that is key to leading a successful life.

But that isn't enough when you're starting a new business. We use our personal experience in the military to point out that you really can't just run on a hunch, even when you're the one who has lived it. We have to validate it in the market by talking with potential customers, alliances and competitors. We must have a solid grasp on the needs of potential clients and any gaps in the market through primary and secondary research, a continuous process because it constantly changes. This was a key step for

Veterans Recovery Resources. An old adage comes to mind: Trust, but verify. We had to validate that what we thought we knew, was actually true.

### **Building a Sustainable Organization**

An integral part of our business strategy was assembling a team of experts that understands the needs of our veteran population and can work to accelerate their well-being by removing the barriers to mental health care. As a service providing organization, we knew that understanding our customers was not only what would make us different, but the ability to do so on a daily basis is what would help prevent veteran suicide and help veterans return to the productive and healthy lives they desperately want and deserve.

To do this, we created a sustainable organizational framework. Our research confirmed that one of the greatest factors often lacking in the treatment of veterans is a cultural competence toward their experiences. We have therefore built a Board of Directors and Advisory Board made up largely of veterans. Our clinical psychologists, counselors and service providers specialize in treating veterans or are veterans themselves. We are laser-focused on understanding the unique needs of our service members and providing a highly specialized recovery program to address those needs.

As the organization was developing, we also proactively worked to address the gaps in the treatment services offered to veterans. Research shows that veterans experience mental health and addiction issues much differently from that of civilians, based on the impact of military culture, combat and being separated from their families. Furthermore, community-based health providers are not often equipped to handle the needs of veterans.

Drawing on the experience of our clinical advisors, Jim Ware and Dr. Joe Currier, we learned that a linear recovery plan simply took too much time out of a veteran's life to allow them to continue earning a living. As a result, our clinical framework is based on a three-part, concurrent treatment program that accelerates recovery. We also knew that addiction recovery is not a one-time event

and must include an ongoing fellowship program to sustain success. In the military, service members operate as a unit. They depend on each other for a successful mission. When the mission ends, it can be hard to find others who understand the issues they face. That's why the program is built by veterans and includes ongoing, regular contact over a lifetime. We also learned that some insurance plans did not cover the support of a veteran's spouse and children. Knowing that addiction is often a family system, we built in services to help service members and their families. Building a sustainable organization helped to refine our business strategy and model.

### **A Sustainable Business Model**

If we can't sustain the business, our cause will be irrelevant. We were very focused on establishing a way to sustain our ability to serve veterans without getting lost in the cause. Veterans risk their lives to defend our freedom every day, but when they come home, their battle can be worse. When you're dealing with life and death, the stakes are high. It was critical that we build Veterans Recovery Resources in a way to both raise the bar on serving veterans and remove the barriers veterans have faced in seeking or receiving care.

We established a set of business outcomes in support of achieving our mission and vision. The first was to create a vibrant network of healthy veterans and their families who support each other over a lifetime. The second was to contribute to the host city's economic development, and the third was to strengthen the local community by sharing what we learn.

To achieve these outcomes, we established a pricing model that would allow us to subsist on a conservative rate of forty percent capacity and built in a generous endowment fund so that an inability to pay for services would not hinder veterans from seeking our help.

We also established a service delivery model to support a comprehensive reintegration strategy for veterans through a close connection to the web of social supports provided by the broader community. Our goal is to work closely with all local veteran service

providers, as well as those further afield.

It is worth noting that the majority of our Board members live in the local community. Because of that, there is a deep dedication and passion to making the business successful. We all have skin in the game.

### **Measuring Success**

Simply put, what gets measured gets done. As a 501(c)(3), we demonstrate accountability and transparency and have established the GuideStar Bronze Badge and will pursue other charity oversight programs. Our treatment program success will be evaluated by a comprehensive set of quantitative and qualitative measures so we are very clear on how and when to adjust the program as the needs of our clients and the market evolve.

Veterans Recovery Resources' focus on a sustainable business model from the outset was designed to help veterans with substance abuse issues not only recover, but flourish over a lifetime. We believe it will also ensure the business will prosper in the long-term. We will be successful when our sustainable business plan meets the heartfelt desire of our cause: happy, healthy, sober veterans making valuable contributions to their families, communities and economy.

John F. Kilpatrick is the founder and executive director of Veterans Recovery Resources, which fulfills his calling to help military service members and veterans struggling with substance abuse and Post-Traumatic Stress Disorder. He's been an accomplished litigation support consultant at his company Legal Imaging for over 19 years. He has over 30 years reserve military service, including 12 years as an intelligence analyst in the U.S. Marine Corps Reserve and over 18 years as a Medical Service Corps Officer in the U.S. Army Reserve.

[veteransrecoveryresources.org](http://veteransrecoveryresources.org)



## Dialogues on Leadership

Here are two viewpoints on topics that impact the overall effectiveness of leaders in a social benefit culture. This isn't a debate - it's a dialogue from the perspectives of two experienced leaders. The goal is to provide different perspectives to stimulate creative thinking and bring leaders into a new paradigm of functioning, not to provide final answers.



**Jeff Magee**

Executive Coach, Human Capital Developer

Jeffrey Magee (Ph.D., PDM, CSP, CMC) is the “Thought Leader’s Leader.” He is a columnist, the publisher of **Professional Performance 360 Magazine**, editor of Performance Execution and Performance Driven Selling blogs, a former nationally-syndicated radio talk show host, published author, and recipient of the USJC TOYA award. A motivational leadership speaker, he is one of the most sought-after keynote speakers in the world.



**Hugh Ballou**

Musical Conductor, Leadership Coach

Hugh Ballou is a Transformational Leadership Strategist, President of SynerVision International, Inc., and was a musical conductor for 40 years. Hugh has written numerous books on Transformational Leadership and works with leaders of religious organizations, business and nonprofit communities as an executive coach, process facilitator, trainer, and motivational speaker, teaching leaders the fine-tuned skills employed every day by orchestral conductors.

### Should we mandate board diversity?

#### Magee —

One of the most destructive actions a Board can take is to mandate diversity, merely to be politically correct. Diversity of thought, background, résumé, knowledge, beliefs, and capacity to constructively add value to the organization are important to the survival and thriving ability of any organization; diversity of ethnicity, gender, generation, lifestyle, religion, economics, geography, etc., are valuable variables only if they serve your organization and constituents. My Player Capability Index™ serves to objectively and thoroughly allow a formula approach to vet any person to ensure you don't become bias blind in dealing with the people you need on your Board or administering your organization.

The leverage point with diversity is to evaluate your human capital needs and ensure that your diversity provides an accelerated advantage in the marketplace! Your Board is far too valuable to be treated as an on-the-job learning experiment for the sake of diversity.

#### Ballou —

Using the word *mandate* is very strong, but diversity is essential for preventing Group Think and for minimizing blind spots. We've been through periods in history, for example, when women have been blocked from meaningful engagement in our society: voting in public elections, being ordained as clergy, and even joining Rotary Clubs around the world. It took a Supreme Court decision to force Rotary International to admit women to membership in 1987. Now there are over 200,000 women members. It's now mandated that there is no gender discrimination, however our white, male centric language we use at meetings in announcements and prayers are not inclusive.

Rather than a mandate for diversity, it's far better for the organization to define guiding principles for decisions. A guiding principle could be to look for people who are different from us to allow for better discussions, more creativity, and minimization of blind spots for improved effectiveness and relevance. The symphony orchestra has not only diversity in the sounds of the instruments, it also has different personalities that go with each of the different cultures of the instrument groups, but everyone works together in creating the culture of the ensemble, which is a synergy of higher performance.

Mandates are rules for minimum standards. Principles are guidelines for higher performance.

## Should we mandate that 5% of revenue goes into an endowment fund for future projects?

**Magee —**

This is brilliant and should be an institutional SOP of any organization. Every Board should have a budget and ensure they work within that budget. A valuable line item should be benchmarking their immediate operational needs with the organization's intermediate and long-term needs. This is where most Boards fail.

**Ballou —**

I remain true to the standard of principles over rules or mandates. Proper planning and budgeting should always provide for future needs. It's good stewardship to plan ahead with a constantly funded major maintenance account for facility needs. It's good stewardship to set aside retirement funding. It's also good stewardship to put

aside money for legacy projects and the legacy of the organization by building an endowment fund.

Think of all of the buildings, organizations, and projects with the name Carnegie attached. Andrew Carnegie wanted to give away his fortune in ways that benefitted humankind and didn't harm people. He was successful.

Not only should the organization set aside money from current cash flow, it should encourage members, volunteers, and other stakeholders to do the same. Effective leadership is modeling what others can do.

Create guiding principles around legacy funding in the strategic plan and incorporate the payments into the budget.

## Should we designate the engagement of "green initiatives" as a mandate of the Board/oversight entity?

**Magee —**

This is more public relations oriented than a business reality of value to most organizations and their Boards. It depends upon what the mission statement of the organization is charged with honoring, as to whether *green* should even be discussed. Being fiscally and appropriately environmentally responsible is common sense and business sense smart, not just green. If going green is about leaning decisions, actions, commitments toward being fashionable, then the Board would be failing at its fiduciary responsibilities. While being green in the big picture into our future is one of a mix of reality variables, it is not the sole answer. Be mindful that green energy as a large-scale initiative can be a financial failure and significantly subsidized by taxpayers' government underwritten allowances, so this topic is very politically charged.

**Ballou —**

It's crucial that tax-exempt organizations stay out of political involvement. We risk alienating some supporters and we might put our tax-exempt status at risk, as well. It's important for the leadership of any charity to focus on the objectives in the organization's strategic plan. If we focus on the work planned, then we don't get off track on side issues which might limit our effectiveness. If *green* is not our work, then we might not want to get involved with this or other issues. Focus on our objectives to achieve our vision and mission and let individuals decide on issues themselves.

If we are not, however, responsible citizens of our planet and pollute the world so that others don't have quality of life, then we are practicing bad stewardship. Preserving energy and protecting the environment are cost-saving measures, as well as being socially responsible and not political.

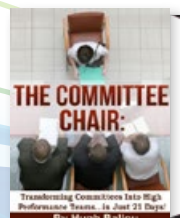
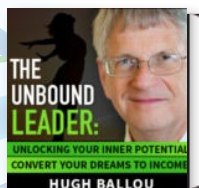
We must focus on principles and build consensus around principles for unity.

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# Board Sustainability

## through a Strong Culture



The Board of Directors is central to the organization. The character and integrity of the leadership of any organization sets the tone for the entire organization. The culture reflects the leader. The board is key to effective organizational sustainability. Let's examine building and strengthening relationship sustainability of boards.

### Clarify roles and expectations

Many organizations have no definition of the role and responsibility of the board and its members. To create effective, high functioning teams (the board is the top team), onboard new people thus:

1. Recruit for a specific competency and verify that particular skill;
2. Define a specific role and responsibility;
3. Check for alignment with core values and guiding principles;
4. Develop a statement of expectations.

When our roles and expectations are not clear, what we think we should be doing might not be a part of the plan, setting up conflict.

### Plan for dealing with conflict and criticism

Where there are humans, there will be conflict and disagreement. It's a sign of energy in the culture. But conflict and disagreement can be creative tools! Conflict can exist between leaders, and between leaders and the membership. Leaders must create a strong enough relationship so that outside pressures do not divide them.

Conflict between board members must be dealt with directly, openly, and promptly. Disagreements must remain between them and not spoken of outside the meeting room. Speaking outside the relationship is breaking a confidence and is not acceptable. Keeping it

within the context of the discussion and not taking it personally, if that isn't intended, is essential. Conflict must not fester and must be resolved as soon as possible. We must be unified to function at our highest level.

### Determine a way to achieve consensus

When decisions do not come easily, a possible paradigm is to work toward consensus. The root of consensus is consent. Each person gives consent to a decision that is not necessarily a personal first choice, but is the best choice for the common good. Reaching consensus involves listening, discussing, considering other points of view, responding, safely debating, forming a concept, revising the concept, and adopting the final concept.

Debate may be a creative activity for one person and a challenge to authority for another person. It should be determined how to explore options and discuss the facts. Board members should come to meetings well prepared, but able to make adjustments in the plan as needed.

Reaching decisions effectively is determined by the strength of the trust between the parties, as well as the level of respect earned by working together. Relationship strength is shown by how the parties work together and by how they handle themselves when things do not go as planned. Leadership professionals must always act professionally.

### Prepare for difficulties

Relationships are defined when the going gets tough. For example, board members should plan how to respond when antagonists in the organization try to triangle their relationships. Relationship integrity is preserved by not taking sides and observing the triangles, the basic building block of

human relationships (neither bad nor good) created by three people in a relationship. Observing triangles helps leaders on boards stay calm and focused.

The well-prepared team is ready to work through situations when there is criticism. It requires being strong and not taking general comments personally; not getting pulled into irrelevant conflict; listening, observing, and listening more. The words may not give the entire message.

At this point, a fragile relationship can turn to conflict in an effort to preserve position or self-esteem. The relationship is strengthened not by what happens, but by how it is handled. Members must stay in touch; be open and honest; admit failure, if needed; seek to understand issues first, and then seek options. Solutions come last.

### Celebrate life and success! Success should be celebrated

Celebration doesn't have to be shallow, phony or funky. A genuine celebration of our abundance attracts more of the same. Celebrate!

Hugh Ballou, SynerVision Leadership Foundation's Founder and President, is The Transformational Leadership Strategist™ and Corporate Culture Architect™ working with visionary CEOs, pastors and nonprofit leaders and their teams to develop a purpose-driven, high-performance, collaboration culture that significantly increases productivity, profits and job satisfaction. [synervision.us](http://synervision.us)



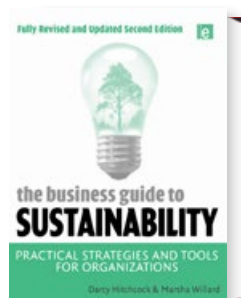
# Nonprofits Collaborating for Sustainability



Sustainability addresses social, economic and environmental issues, seeking creative solutions that make all three better, or at least not trade them off. Typical trade-offs include jobs or the environment, growth or quality of life.

Most nonprofits focus on only one area: economic development, the environment, or social issues like hunger and homelessness. Nonprofits do great work in their silos. But often a structure to manage their interdependencies is missing. There is, after all, a relationship between waste and water, food and land use, energy and economics.

In the Sedona, Arizona area, several local nonprofits formed the Sustainability Alliance, a coalition for us to explore our interdependencies, share resources, and cross-promote one another's events. Some members were reluctant initially, worrying about time commitments and being pulled away from their core mission. And each group had promised not to share its email list with others.



But we had shared goals and interests. Two groups were working with schools; two had a speaker's series. We were all concerned about how development and tourist-driven traffic was affecting our communities and straining our water resources.

There are benefits to working together. We can speak with a unified voice. We have found creative, multi-disciplinary solutions to local issues. And because we are seen as trying to make everything better - our economy, livability and environment - we are becoming a respected go-to group for advice.

Here's my advice for getting started.

## **Develop a shared understanding**

We started by comparing where our passion for sustainability came from. This helped us understand one another and uncovered shared assumptions and visions.

I gave a briefing on The Natural Step's science-based framework for sustainability so we would share a mental model for sustainability. We analyzed the region's issues and opportunities within that framework to gain a sense of priorities.

## **Identify manageable joint projects**

Start small and work incrementally. We identified three program areas to work on.

## Education

Those working with schools worked together to offer holistic teacher training on sustainability and coordinated our services to each school based on their interests and needs. We've also set up a Sustainable Entrepreneurship Microloan Program for Schools.

## Business

We wanted a way to recognize businesses that were working toward sustainability and to encourage others to move in that direction. We couldn't find certification that met our criteria (fast, easy and cheap; applied to all industries; offered levels of performance that included social and environmental criteria with the highest level as full sustainability). So, through a member's technical skills, we built an online system which we can share with well-positioned organizations in other regions.

## Community

Metrics can really focus people. We are developing sustainability indicators so we can compare communities in our region

on factors like recycling, hunger, quality of life, solar power production, and river flows, to see over time if we are approaching full sustainability.

Concurrently the region has decided to brand itself as a sustainable destination, so economic development folks now need some of our programs, creating community interest in and support for our work.

### Keep your eyes open for opportunities

Opportunities will crop up where your group could offer useful insights. Our Alliance sometimes acts like a mini-think tank, a forum to find elegant solutions solving multiple problems at once. We have assembled interdisciplinary recommendations for a variety of local issues including solving traffic problems using existing infrastructure. We've also made recommendations regarding undeveloped City land, how to get the biggest sustainability bang for their buck.

### Operate on a shoestring

All of this has been done without funding. You can get lots done when you offer people

an important project aligned with their passions and you don't care who gets credit. Start small and identify someone with project management and meeting facilitation skills to lead it.

It's definitely been worth it. We hope you'll give it a try. Let us know if we can help.

Darcy Hitchcock, Collaborator in Chief for the Sustainability Alliance, has advocated for organizational democracy and sustainability for over 25 years. She's a keynote speaker, the author of 10 books, and the co-founder of the International Society of Sustainability Professionals where she teaches online classes on sustainability assessments to an international audience. [www.SustainabilityAllianceAZ.org](http://www.SustainabilityAllianceAZ.org)  
Darcy@SustainabilityAllianceAZ.org

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## Do Good, While Doing Business

# Tips for Sustainable Fundraising



Every organization wants a stream of regular income. To get to that level of growth, nonprofits must rely on sustainable fundraising platforms. These allow organizations to bridge the gap from more traditional methods of fundraising, like special events and grants, into a progressive world of major gifts, taking their financial future into their own hands.

Achieving long-term sustainability in fundraising takes a plan of action, time, and hard work. Here are five important tips to get you started with sustainable fundraising.

**Choose a team.** Who will work your plan is just as important as what the plan is. Include staff, board members, volunteers and donors, as each brings expertise and perspective to draw from.

The leader of the initiative must understand team value and how to leverage the team's variety.

**Begin with the end in mind.** Know the direction your organization is headed in order to get there. A plan is simply a roadmap to take you to a certain destination. Ask questions to figure out your end goal.

What will people say about you in three to five years? How many constituents will you serve? What will it cost? What's your ideal revenue map - one big donor or several smaller? How do you want donors to give? What are alternative funding methods?

When you've figured out your end game, you are on the way to your destination.

**Define your point of entry.** Every plan must start somewhere. There is no right or wrong way to start. The best entry point is one that

will have prompt and efficient action. This doesn't always mean starting with what's familiar; you may get more action venturing into the unknown. Don't discount starting something new.

How and what you choose is not as important as deciding to do something. There will be plenty of mistakes but, certainly, the biggest mistake is not starting at all.

**Adopt a Know Thy Donor mantra.** Blanket your plan with knowing your donors. Donor cultivation is the key to sustainable fundraising.

Big and small donors keep the organization alive. You probably send them massive amounts of information on you, but what do you know about them? Do they like what you're sending? What is their learning modality: print, video or audio? Would they prefer a large event or personal tour? Why are they interested in your work?

If you can't answer these questions, it's time to learn about your donors. Every donor is an individual campaign, so you must know as much about them as possible. This is the crux of sustainable fundraising, so make it a priority.

Think about your personal friends. The person who remembers your birthday, favorite color, likes and dislikes, is probably one of your best

friends. You'd do just about anything for best friends. That is how you build a loyal donor base: know them and care for them as best friends and they will become your best asset.

**Integrate the plan into the organization.** Get everyone involved by making the plan a part of the daily workflow. Let everyone know

they're part of the plan. Communication is key to getting support. Everyone wants to be included when a winning proposition is presented, so make sure your team knows you're launching a winner!

These tips should give you a great start to sustainable fundraising. One final tip: Document everything. Store your data in a secure database program that allows you to keep track of successful and failed campaigns and connections with donors and volunteers. When you know what works, do more of it. When you see what's failed, tweak, change or eliminate it completely.

There are many paths to sustainable fundraising, just as there are many ways to receive these gifts. As you seek funding - unrestricted, major gifts, capital or endowment funds - know that with a plan of action and a little help from cultivated relationships, you can achieve great things.

Dr. Thyonne Gordon is an accomplished social profit management expert, writer and producer. Her work with nonprofit organizations and youth development has empowered hundreds of organizations nationwide by creating growth oriented businesses, strong board governance, productive teams, and sustainable fundraising strategies using her proven technique of the S.T.O.R.Y. Accelerator™. [www.drthyonne.com](http://www.drthyonne.com)



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