

**Wisconsin Indianhead Technical College  
Nonprofit Conference  
Here Today, Here Tomorrow**

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**Here Today, Here Tomorrow:  
Sustaining and Growing a Mission Focused Organization in Hard Times**

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The many challenges that nonprofits were already facing have intensified in the last few years owing to the severe economic downturn nationally and globally.

What's a struggling nonprofit to do? There are at least 10 strategies that need to be considered. These strategies will have greatest impact if they are implemented in a coordinated fashion over time -- and they need to be incorporated into your capacity building and strategic planning efforts now!

**10 High Priority Strategies**

1. Embed capacity building into the fabric of your nonprofit
2. Build an exceptional board
3. Engage in accelerated strategic thinking and planning
4. Forge partnerships and alliances to increase mission impact and sustainability
5. Develop board and staff succession plans
6. Build capacity for effective public policy and advocacy
7. Master use of social media
8. Deploy targeted volunteer engagement strategies
9. Review and revise your theory of change (and be sure to have one)
10. Adopt regional thinking and problem solving approaches

**Strategy #1 -- Embed capacity building into the fabric of your nonprofit**

- **Capacity Building Toolkit.** The Capacity Building Toolkit has been designed to support nonprofit leaders who wish to engage in capacity building in a systemic way. Go to: <http://www.createthefuture.com/CBtoolkit.htm>

## Strategy #2 -- Build an exceptional board

### A Hybrid Board Governance Framework

There are a dizzying number of governance models that have emerged over the last several years and an equally dizzying number of valiant efforts to categorize and sort out the main models. At the same time there is broad emerging agreement about the core qualities of effective boards. Here is a quote from Mel Gill, president of Synergy Associates:

*There is a growing convergence of expert opinion that the most effective boards, regardless of the size, complexity or mandate of their organizations, concentrate their attention on those matters that are crucial to success or survival; that they focus on measurable results within defined timetables; that they engage in regular monitoring of the manner in which business is conducted, the efficient use of resources and the achievement of objectives; that their decision-making is transparent, and that they provide proper accounting to key stakeholders.*

*Effective boards focus their attention on "the critical few, rather than the trivial many", regardless of whether these are operational, management, or governance (strategic or fiduciary) issues.*

*The most successful boards, within this framework, develop a collaborative partnership with senior management; seek agreement between key stakeholders on vision, values, goals and expectations (tempered by the reality of available resources); ensure clarity with respect to roles and responsibilities; establish constructive processes for resolution of conflicts and conflict of interest; and cultivate an organizational culture characterized by trust, teamwork, mutual respect, flexibility, adaptability, and responsiveness in the face of the ever-changing realities, resources and needs of consumers.*

Gill also talks about "dynamic hybrids" -- increasingly boards are developing dynamic hybrids of several board types, adapting concepts and practices that best fit their particular circumstances.

In response to this "dizzying array" of models and approaches, I propose that we draw on the following three resources as we think about exceptional board governance – a framework, systems and practices that will be the foundation for our work:

#### **Dynamic Board Model from McKinsey & Co. (detail on page 3)**

- Core Roles and Responsibilities
- Quality of Board Effectiveness Enablers
- Key environmental factors impacting the focus of the board
- Managing the Life Stage Transition the Board
- Valuing Individual Board Members

#### **12 Governance Principles That Power Exceptional Boards from BoardSource (detail on page 4)**

- Twelve common traits and actions that distinguish "exceptional" boards from "responsible" boards
- Describes an empowered board that is a strategic asset to be leveraged

#### **Governance as Leadership Framework from Chait, Ryan and Taylor (detail on page 5-6)**

- Three types of governance: fiduciary, strategic and generative
  - Fiduciary mode: key question -- "How are we doing?"
  - Strategic mode: key questions -- "What are we doing?" "Where are we going?" and
  - Generative mode: key questions -- "Why are we doing this?" "What are the possibilities?"

## McKinsey & Company's Dynamic Board Framework

The McKinsey model is a systems approach to governance that links together core board governance responsibilities, key environmental factors impacting the focus of the board, and board effectiveness enablers.

### The Three Core Board Governance Responsibilities

1. Shape mission and strategic direction
  - a. Shape the mission and vision
  - b. Engage actively in strategic decision making and policy decisions
2. Ensure leadership and resources
  - a. Select, evaluate, and develop the CEO
  - b. Ensure adequate financial resources
  - c. Provide expertise and access for organizational needs
  - d. Enhance reputation of organization
3. Monitor and improve performance
  - a. Oversee financial management and ensure appropriate risk management
  - b. Monitor performance and ensure accountability
  - c. Improve board performance

### Key Environmental Factors Impacting the Focus of the Board

Monitor external and internal environment to highlight areas for board attention

- Life stage of an organization.
- Skills of CEO and staff.
- Stability and adequacy of income.
- Changes in underlying social issue.
- Changes in competitive or philanthropic landscape.

### Quality of Board Effectiveness Enablers

Well executed, these enablers build on the passion board members have for the mission by making their service personally rewarding, efficiently delivered and valuable to the organization:

- Careful decisions on board size and structure
- Actively managed board composition
- Inspired board and committee leadership
- Simple administrative practices and processes made routine

**Source: The Dynamic Board: Lessons from High-Performing Nonprofits.** The report summarizes the best practices identified by McKinsey & Co. Go to:

<http://www.ascendtechnologies.com/kb/questions.php?questionid=34>. McKinsey & Co. has also developed a valuable self-assessment tool for nonprofits based on the Dynamic Board model. Go to: [http://www.boardnetusa.org/graphics/attachments/boardselfassess\\_long.pdf](http://www.boardnetusa.org/graphics/attachments/boardselfassess_long.pdf)

## Twelve Governance Principles That Power Exceptional Boards

1. **Constructive Partnership:** Exceptional boards govern in constructive partnership with the chief executive, recognizing that the effectiveness of the board and chief executive are interdependent. They build this partnership through trust, candor, respect, and honest communication.
2. **Mission Driven:** Exceptional boards shape and uphold the mission, articulate a compelling vision, and ensure the congruence between decisions and core values. They treat questions of mission, vision, and core values not as exercises to be done once, but as statements of crucial importance to be drilled down and folded into deliberations.
3. **Strategic Thinking:** Exceptional boards allocate time to what matters most and continuously engage in strategic thinking to hone the organization's direction. They not only align agendas and goals with strategic priorities, but also use them for assessing the chief executive, driving meeting agendas, and shaping board recruitment.
4. **Culture of Inquiry:** Exceptional boards institutionalize a culture of inquiry, mutual respect, and constructive debate that leads to sound and shared decision making. They seek more information, question assumptions, and challenge conclusions so that they may advocate for solutions based on analysis.
5. **Independent-Mindedness:** Exceptional boards are independent-minded. They apply rigorous conflict-of-interest procedures, and their board members put the interests of the organization above all else when making decisions. They do not allow their votes to be unduly influenced by loyalty to the chief executive or by seniority, position, or reputation of fellow board members, staff, or donors.
6. **Ethos of Transparency:** Exceptional boards promote an ethos of transparency by ensuring that donors, stakeholders, and interested members of the public have access to appropriate and accurate information regarding finances, operations, and results. They also extend transparency internally, ensuring that every board member has equal access to relevant materials when making decisions.
7. **Compliance with Integrity:** Exceptional boards promote strong ethical values and disciplined compliance by establishing appropriate mechanisms for active oversight. They use these mechanisms, such as independent audits, to ensure accountability and sufficient controls; to deepen their understanding of the organization; and to reduce the risk of waste, fraud, and abuse.
8. **Sustaining Resources:** Exceptional boards link bold visions and ambitious plans to financial support, expertise, and networks of influence. Linking budgeting to strategic planning, they approve activities that can be realistically financed with existing or attainable resources, while ensuring that the organization has the infrastructure and internal capacity it needs.
9. **Results-Oriented:** Exceptional boards are results-oriented. They measure the organization's progress towards mission and evaluate the performance of major programs and services. They gauge efficiency, effectiveness, and impact, while simultaneously assessing the quality of service delivery, integrating benchmarks against peers, and calculating return on investment.
10. **Intentional Board Practices:** Exceptional boards purposefully structure themselves to fulfill essential governance duties and to support organizational priorities. Making governance intentional, not incidental, exceptional boards invest in structures and practices that can be thoughtfully adapted to changing circumstances.
11. **Continuous Learning:** Exceptional boards embrace the qualities of a continuous learning organization, evaluating their own performance and assessing the value they add to the organization. They embed learning opportunities into routine governance work and in activities outside of the boardroom.
12. **Revitalization:** Exceptional boards energize themselves through planned turnover, thoughtful recruitment, and inclusiveness. They see the correlation between mission, strategy, and board composition, and they understand the importance of fresh perspectives and the risks of closed groups. They revitalize themselves through diversity of experience and through continuous recruitment.

Source: BoardSource.org

## **Governance Reframed as Leadership by Chait, Ryan and Taylor**

Boards could govern more effectively by taking a leadership approach to their work. Just as today's complex organizations demand leaders who work in multiple modes, they demand boards that govern in multiple modes. The authors posit that there are three modes of governance that together constitute governance as leadership. Unless boards govern in these three modes, it cannot be said that they are truly governing:

- Type I, the fiduciary mode, is where boards are concerned primarily with the stewardship of tangible assets. Type I constitutes the bedrock of governance - the fiduciary work intended to ensure that nonprofit organizations are faithful to mission, accountable for performance, and compliant with relevant laws and regulations. Without Type I, governance would have no legitimacy. If a board fails as fiduciary, the organization - not to mention its donors, clients, or community - could be harmed.
- Type II, the strategic mode, is where boards develop strategy with management to set the organization's priorities and course, and to deploy resources accordingly. Without Type II, governance would have little power or influence. It would be more about staying on course than setting the course.
- Type III, the generative mode, is where boards, along with executives, frame problems and make sense of ambiguous situations - which in turn shapes the organization's strategies, plans, and decisions. Because most organizations lack frameworks and practices for this work, it's easy for boards to become bystanders to it - even though it is central to governance.

A board's effectiveness increases as the board members become more proficient in more modes. A board that excels in one mode (or two) but flounders in another one (or two) will govern far less effectively than a board that ably works in all three. To succeed in all three modes, boards need to "cross-train" so that the "muscle memory" of one mode does not dominate to the detriment of the others. When boards overemphasize one mode to the exclusion of others (a common problem), the net results are worse, not better, governance.

***A fuller depiction of the Governance as Leadership Framework follows on the next pages***

## Governance as Leadership: Three Modes of Governing

In *Governance as Leadership*, Richard Chait, William Ryan, and Barbara Taylor take two familiar concepts (governance and leadership), reframe them, and relate them in a manner that forces readers to think deeply and untraditionally about both. Our culture tends to think of both concepts individually — governor and leader as individual actors. The authors force us to think of both communally. Only when we are able to do that will our institutions have the capacity to utilize the multiple assets available to them and in turn become more vital. The authors remind us that our world and our institutions have become immensely more complex. For trustees, governing has become more complicated and can no longer be reduced to simple aphorisms like “boards set policies and administrators implement” or “boards establish ends and management determines means.” At the same time, board work is often highly episodic, undemanding, and unsatisfying. The authors reject the often suggested board renewal strategies — develop a clear board structure and define the responsibilities and tasks of each board committee and member. Boards have to be engaged in meaningful, challenging, and provocative work if they are to become fully engaged and energized for their task. The authors conceive of board work and functioning in three types or modes, not tasks or structures (see table below and box on next page).

<b>Type I - Fiduciary governing</b>	<b>Type II - Strategic governing</b>	<b>Type III - Generative governing</b>
<ul style="list-style-type: none"> <li>• Understands the trustee as one who holds assets for the benefit of another.</li> <li>• Board ensures assets are conserved and optimized to support mission.</li> <li>• Boards see that resources are used efficiently and responsibly — budgets are focal point.</li> <li>• Boards focus on oversight and accountability, reports and approving, rather than discussion, imagination, visioning, strategizing, and valuing.</li> </ul>	<ul style="list-style-type: none"> <li>• Strategic thinking and planning are primary mode and focus.</li> <li>• Lurking behind everything: Quest for the institution’s primary focus, its core task.</li> <li>• Board organizes around strategic priorities, not administrative operations.</li> <li>• Balanced budgets are no longer sufficient if resources are dedicated to the wrong purposes.</li> <li>• Trustees ask: What business are we in? What do our customers want? Where do we have a comparative advantage? What are our core competencies?</li> </ul>	<ul style="list-style-type: none"> <li>• Focuses primarily on “framing the problems and issues” and meaning making or “making sense” out of something.</li> <li>• Inevitably subjective in nature, but generates other critical processes of mission setting, strategy development, and problem solving.</li> <li>• Provides both a new frame for understanding the organization and its environment and a new vocabulary for talking about what is perceived.</li> <li>• The creative foundation out of which goal setting and decision-making originate.</li> </ul>

Source: “Rethinking the Board’s Central Purposes.” A Review of *Governance as Leadership*  
[http://www.intrust.org/magazine/pdf/au05\\_books.pdf](http://www.intrust.org/magazine/pdf/au05_books.pdf)

### Strategy #3 -- Engage in accelerated strategic thinking and planning

#### Foremost Strategic Challenges Facing the Organization Over the Next 3 years

Foremost strategic issues and challenges that the organization will need to address over the 1-3 years	What roles would be appropriate for the board to play in addressing each issue listed in Column 1?	Clarify the board's need for information and education regarding this issue. (In order to make good decisions in response to this issue, what new things will the board need to know and be able to do?)	What resources can the Board access to help address this issue?
1.			
2.			
3.			
4.			

<b>Trends</b>	<b>Issues</b>	<b>Strategies</b>
<b>Identifying Changes and Trends</b>	<b>Identifying Critical Strategic Issues</b>	<b>Developing Strategies</b>
<p><b>Instruction:</b> Brainstorm a list in response to this question: What are the external changes and trends having the greatest impact on our nonprofit (or organizations in our community, service area, or region)? Consider changes in technology, demographics, lifestyle/values, legal, economic, political, giving, volunteerism, etc.</p>	<p><b>Instruction:</b> Reflect on the major external changes/ trends that you identified in the previous step.</p> <p>Now with reference to selected trends, list what you believe are the 2-3 <u>most</u> critical issues facing the organization over the next 3-5 years. Try to word your statements in the form of questions as in the example below:</p>	<p><b>Instruction:</b> With reference to the critical issues you identified in the second step, devise strategies and responses that address those critical issues. See the example below:</p>
<p><b>Example:</b> <i>Emerging technologies will continue to transform the ways organizations can communicate with their markets/constituencies.</i></p>	<p><b>Example:</b> <i>How can our organization make the most effective use of emerging technologies to strengthen our relationships with donors, volunteers, members and other key supporters?</i></p>	<p><b>Example:</b> <i>Introduce/expand use of emerging technologies to strengthen communication with key constituencies.</i></p>



## Strategic Thinking and Planning Resource List

- Basic Overview of Various Strategic Planning Models by Carter McNamara, [http://www.managementhelp.org/plan\\_dec/str\\_plan/models.htm](http://www.managementhelp.org/plan_dec/str_plan/models.htm)
- Business Planning Resources for Nonprofits by The Bridgespan Group, <http://www.bridgespan.org/LearningCenter/ResourceDetail.aspx?id=2382>.
- Business Planning for Nonprofits: Why, When — and How It Compares to Strategic Planning. Brigitte Rouson. [http://www.allianceonline.org/assets/library/7\\_businessplanningfornonpro.pdf](http://www.allianceonline.org/assets/library/7_businessplanningfornonpro.pdf)
- Effective Strategic Planning: Getting Your Organization Focused and Directed by Michael Burns and Paul Yelder, <http://www.practitionerresources.org/cache/documents/36796.pdf>
- Field Guide to Nonprofit Strategic Planning and Facilitation by Carter McNamara, MBA, PhD, [http://www.authenticityconsulting.com/pubs/SP\\_gdes/SP\\_pubs.htm](http://www.authenticityconsulting.com/pubs/SP_gdes/SP_pubs.htm).
- Nonprofit Sustainability: Making Strategic Decisions for Financial Viability by Jeanne Bell, Jan Masaoka and Steve Zimmerman. <http://spectrumnonprofit.com>.
- Presenting: Strategic Planning: Choosing the Right Method for Your Nonprofit Organization by Michela M. Perrone Ph.D. and Janis Johnston and BoardSource, [http://www.boardsource.org/Bookstore.asp?category\\_id=47&Item=179](http://www.boardsource.org/Bookstore.asp?category_id=47&Item=179).
- Stanford Social Innovation Review published by the Center for Social Innovation at the Stanford Graduate School of Business, <http://www.ssireview.com>.
- Strategic Planning for Public and Nonprofit Organizations: A Guide to Strengthening and Sustaining Organizational Achievement by John M. Bryson, <http://www.josseybass.com/WileyCDA/WileyTitle/productCd-0787967556.html>
- Strategic Planning Resource Collection by Professor Andrew B. Lewis, Center for Community Economic Development, University of Wisconsin Extension, [http://www.uwex.edu/ces/cced/nonprofits/management/sites\\_strategic.cfm](http://www.uwex.edu/ces/cced/nonprofits/management/sites_strategic.cfm).
- Strategic Planning Workbook for Nonprofit Organizations by Brian W. Barry and the Fieldstone Alliance, <http://www.fieldstonealliance.org/productdetails.cfm?PC=39>
- Strategic Planning: A Practical Handbook for Nonprofit Organizations by Michael Allison and Jude Kaye, <http://www.wiley.com/WileyCDA/WileyTitle/productCd-0471445819.html>.
- Strategically Speaking Blog by Frank Martinelli. Go to: <http://www.strategicthinkingandplanning.blogspot.com>.
- The Drucker Foundation Self-Assessment Tool Process Guide by the Peter F. Drucker Foundation for Nonprofit Management and Gary J. Stern, <http://www.wiley.com/WileyCDA/WileyTitle/productCd-078794436X.html>
- The MacMillan Matrix for Competitive Analysis of Programs, <http://www.pasesetter.com/documents/pdf/turbtimes/Competitive%20Analysis.pdf>.
- The Nonprofit Quarterly published by Nonprofit Information Networking Association, [www.nonprofitquarterly.org](http://www.nonprofitquarterly.org).
- The Nonprofit Strategy Revolution by David La Piana. <http://www.nonprofitstrategyrevolution.org>.
- Toolkit for Developing a Social Purpose Business Plan, by Structured Employment Economic Development Corporation (Seedco), <http://www.community-wealth.org/pdfs/tools/social/tool-seedco-SEbusiness-plan.pdf>.
- What If? The Art of Scenario Thinking for Nonprofits published by the Global Business Network, <http://www.gbn.com/ArticleDisplayServlet.srv?aid=32655>

## Strategy #4 -- Forge partnerships and alliances to increase mission impact and sustainability

### Effective Partnerships Resource List

#### **Websites for Partnership Information and Resources:**

- AllianceStrategy.com Ben Gomes-Casseres, Professor at Brandeis University and co-author of “Mastering Alliance Strategy” (Jossey-Bass, 2003). Go to: [www.alliancestrategy.com](http://www.alliancestrategy.com).
- Drucker Nonprofit Innovation Discovery Site. Database of nonprofit innovation maintained by the Leader to Leader Institute. Go to: <http://www.leadertoleader.org/knowledgecenter/innovation.aspx>. In the Area of Focus box, Select “Alliances, Partnerships”.
- Strategic Restructuring Website. Developed by Strategic Solutions, a project of LaPiana Associates. Go to: <http://www.lapiana.org/Strategic-Restructuring>.

#### **Publications for Partnership Information and Other Resources:**

- Jane Arsenault, Forging Nonprofit Alliances. San Francisco: Jossey Bass, 1998.
- James Bamford, Ben Gomes-Casseres, and Michael Robinson, Mastering Alliance Strategy, San Francisco: Jossey-Bass, 2003. For elaboration and related ideas from Ben Gomes-Casseres, Professor at Brandeis University, see his website at [www.alliancestrategy.com](http://www.alliancestrategy.com). Also the book site at [www.masteringalliancestrategy.com](http://www.masteringalliancestrategy.com)
- The Drucker Foundation, Meeting the Collaboration Challenge: Developing Strategic Alliances between Nonprofit Organizations and Business. San Francisco: Jossey Bass, 2001. For a number of related resources, go to: [http://www.leadertoleader.org/tools/collab\\_challenge/challenge.html](http://www.leadertoleader.org/tools/collab_challenge/challenge.html).
- David La Piana, The Nonprofit Mergers Workbook: The Leader’s Guide to Considering, Negotiating and Executing a Merger. St. Paul: Amherst H. Wilder Foundation, 2000.
- Nonprofit Leadership And Administration Faculty at Western Michigan University. Merger Process Flow Chart, 1998. <http://www.wmich.edu/nonprofit/Guide/guide1.htm>
- Nonprofit Mergers and Acquisitions: More Than a Tool for Tough Times. The Bridgespan Group. <http://www.bridgespan.org/Nonprofit-M-and-A.aspx>
- Karen Ray, The Nimble Collaboration, St. Paul: Amherst H. Wilder Foundation 2002
- Shirley Sagawa, Creating “New Value” Partnerships with Business: Step by Step. Adapted for INDEPENDENT SECTOR by Shirley Sagawa from chapter 10 of Common Interest, Common Good: Creating Value through Business and Social Sector Partnerships, by Shirley Sagawa and Eli Segal (Harvard Business School Press, 2000). A PDF version is downloadable from <http://www.workingfamilyresourcecenter.org/wfrc/docs/Non-ProfitandBusinessPartnerships.pdf>.
- Peter Senge, The Necessary Revolution, New York, Doubleday, 2008.
- Ros Tennyson. The Partnering Toolbox. The Partnering Initiative. <http://www.energizeinc.com/art/subj/documents/ThePartneringToolbookMarch2004.pdf>.
- Alfredo Vergara-Lobo, Jan Masaoska, and Sabrina L. Smith, The M Word: A Board Member’s Guide to Mergers, San Francisco: Compasspoint Nonprofit Services, 2005.
- Jane Wei-Skillern and Sonia Marciano, The Networked Nonprofit. Stanford Social Innovation Review, Spring 2008. <http://www.socialinnovationexchange.org/files/event/attachments/Networked%20nonprofit%20SSIR%20article.pdf>
- Partnership Self-Assessment Tool 2.0. Center for the Advancement of Collaborative Strategies in Health at The New York Academy of Medicine. Go to: [www.partnershiptool.net](http://www.partnershiptool.net)

## Strategy #5 -- Develop board and staff succession plans

### Succession Planning Resource List

**Leadership Transition Resources.** The Texas Commission on the Arts has compiled a number of leadership transition resources including: information on upcoming trends around retiring baby boomers and how that demographic shift will impact your organization's staff, board, donor base, and audience; information about the next generation of leaders including ideas on how to attract and retain them; tools to assess how ready your organization is ready for the next generation. And more. Go to: <http://www.arts.state.tx.us/toolkit/leadershiptransitions>.

**Succession Planning with Your Board** Society of Human Resource Management (SHRM) has compiled tools and resources for board succession planning including The 10-Step Succession Plan for Board Leaders, Succession Planning Questionnaire, Board Roster Template for Succession Planning, Succession Planning Competencies, and more. Go to: <http://www.shrm.org/Communities/VolunteerResources/Pages/succplg.aspx>.

**Executive Transition Monographs** The Annie E. Casey Foundation has published a series of seven on all aspects of executive transitions and executive transition management in nonprofits. Go to <http://www.aecf.org/KnowledgeCenter/PublicationsSeries/ExecutiveTransitionMonographs.aspx>.

**Emergency Succession Plan Template** The purpose of the template is to define the contents of such a plan, and make this essential document easy to adapt and implement. The template includes plans for short-term, long-term and permanent executive director changes. The template includes a specific name or selection criteria would be established to select an acting executive director, a communications plan to notify board members, funders and other key stakeholders. The template also includes a thorough contact inventory. This will allow your organization to take important scattered information and place it all in one document, vital information in case of an emergency. The Center advises that this template should be built and reviewed annually with your organization's board of directors. Go to: [http://www.virtualcap.org/downloads/VC/US\\_Succession\\_CompasPoint\\_Sample\\_Emergency\\_Succession\\_Plan.pdf](http://www.virtualcap.org/downloads/VC/US_Succession_CompasPoint_Sample_Emergency_Succession_Plan.pdf).

**Executive Transition Initiative Succession Planning Toolkit.** The Toolkit was developed by the Executive Transition Institute (ETI) directed by Mindy Lubar, CEO of Price of LeadingTransitions. The ETI is a collaborative effort of the Donors Forum of Wisconsin, the Brico Fund, the Davis Family Foundation, and the Greater Milwaukee Foundation. The Toolkit consists of the following resources:

- #1 Overview of Succession Planning
- #2 Departure Defined Transition Toolkit
- #3 Emergency Succession Planning Toolkit
- #4 Strategic Leadership Development Toolkit

Access the Toolkit at: [http://www.leadingtransitions.com/initiative\\_toolkit.html](http://www.leadingtransitions.com/initiative_toolkit.html)

## Strategy #6 -- Build capacity for effective public policy and advocacy

### Public Policy and Advocacy Resource List

- A Citizen's Guide to Lobbying by Donald E. deKieffer: <http://www.npaction.org/article/articleview/794/1/228>.
- SPARC Building Capacity for Public Policy Tool Kit. [http://www.kintera.org/atf/cf/%7BD1346449-D8DF-4837-AB13-EFE03ED4C250%7D/Building\\_Public\\_Policy\\_Capacity.pdf](http://www.kintera.org/atf/cf/%7BD1346449-D8DF-4837-AB13-EFE03ED4C250%7D/Building_Public_Policy_Capacity.pdf)
- Effective Advocacy at All Levels of Government. Center for Lobbying in the Public Interest and the W.K. Kellogg Foundation, <http://ww2.wkkf.org/advocacyhandbook/index.html>.
- Guide to State Advocacy by NP Action, a project of OMB Watch. <http://www.npaction.org/article/archive/197>.
- Click Here for Change: Your Guide to the E-Advocacy Revolution by Policy Link. [http://www.policylink.org/atf/cf/%7B97C6D565-BB43-406D-A6D5-ECA3BBF35AF0%7D/ClickHereForChange\\_final.pdf](http://www.policylink.org/atf/cf/%7B97C6D565-BB43-406D-A6D5-ECA3BBF35AF0%7D/ClickHereForChange_final.pdf).
- The Center for Lobbying in the Public Interest. [www.clpi.org](http://www.clpi.org).
- NCNA Policy & Advocacy Resources. <http://www.councilofnonprofits.org/nonprofit-advocacy>.

## Strategy # 7 -- Master use of social media

### Social Media/Social Networking Resources List

- **Social Networking Guides and Resources for Nonprofits.** Networking for Good has compiled an excellent collection of introductory articles and resources to help you determine whether or not online social networks including services like Facebook, MySpace, and blogs fit your needs, and if so, how to get started. You can access the collection at <http://www.fundraising123.org/social-networking>. A great place to start is the article entitled "10 Things You Need to Do Prior to Diving into Social Media". Go to: <http://www.fundraising123.org/article/10-things-you-need-to-do-prior-diving-social-media>.
- **YouTube Nonprofit Program.** Does your organization have a compelling story to tell? Do you want to connect with your supporters, volunteers, and donors but don't have the funds to launch expensive outreach campaigns? YouTube can help. Video is a powerful way to show your organization's impact and needs, and with a designated "Nonprofit" channel on YouTube, you can deliver your message to the world's largest online video community. Go to: <http://www.youtube.com/nonprofits>.
- **Everything You Need to Know About Web 2.0.** Web 2.0 is a category of new Internet tools and technologies that focuses on the idea that the people who consume media, access the Internet, and use the Web shouldn't passively absorb what's available -- rather, they should be active contributors, helping customize media and technology for their own purposes, as well as those of their communities. These new tools include, but are not limited to, blogs, social networking applications, RSS, social bookmarking, and wikis. This resource provided by Techsoup includes articles on a variety of Web 2.0 tools and technologies. Techsoup intends to update this page from time to time so you can check back to learn about the latest technologies for your organization. Go to: <http://www.techsoup.org/toolkits/web2>.
- **Social Change Takes More Than Social Media.** Go to: <http://www.netsquared.org/blog/rootwork/social-change-takes-more-social-media>.

## Strategy # 8 – Deploy targeted volunteer engagement strategies.

- **Everyone Ready Professional Development Program in Volunteer Management.** Everyone Ready® is a professional development program in volunteer management delivered via Online Seminars, electronic Self-Instruction Guides, interactive discussion boards, and other online resources. To learn more about this innovative approach to training, go to: <http://energizeinc.com/everyoneready>.
- **Calculating the Economic Impact of Volunteers.** The Economic Impact of Volunteers Calculator created by the Points of Light Foundation estimates the appropriate wage rate for volunteer time based on what the person does, the value of specific tasks according to market conditions as reported by the US Department of Labor. Organizations can use the Calculator to determine the value of the time their volunteers give doing a wide variety of volunteer jobs. Go to: <http://www.handsonnetwork.org/tools/volunteercalculator>.
- **Sample Volunteer Job Descriptions.** The Community Services Council of Newfoundland and Labrador whose mission is to encourage citizen engagement, has created an excellent resource for the development of volunteer job descriptions. To learn more about creating job descriptions for volunteers, go to: [http://www.envision.ca/voljobdesc/example\\_form.asp](http://www.envision.ca/voljobdesc/example_form.asp). To view a variety of sample volunteer job descriptions to help determine the type of volunteer you are looking for, go to: [http://www.envision.ca/voljobdesc/description\\_form.asp](http://www.envision.ca/voljobdesc/description_form.asp). Then to create volunteer job descriptions, you can use an interactive template. You can view your job descriptions online, print them or email them, go to: [http://www.envision.ca/voljobdesc/example\\_form.asp](http://www.envision.ca/voljobdesc/example_form.asp).
- **The New Volunteer Workforce** by David Eisner, Robert T. Grimm Jr., Shannon Maynard, & Susannah Washburn. Stanford Social Innovation. [http://www.ssireview.org/articles/entry/the\\_new\\_volunteer\\_workforce](http://www.ssireview.org/articles/entry/the_new_volunteer_workforce).
- **Reinventing Aging.** Harvard School of Public Health–MetLife Foundation Initiative on Retirement and Civic Engagement. <http://www.hsph.harvard.edu/chc/reinventingaging/Report.pdf>.
- **Resources on Baby Boomers.** The collection available at the website of the National Corporation for Community Service originally compiled by Temple University in April 2008, offers a list of resources for those who have had limited experience with this population, or anyone who would like to learn more. <http://www.nationalserviceresources.org/node/17899>. Also see
- **The Boomers' Guide to Good Work.** Ellen Freudenheim is the author of a new guide to help boomers find public service jobs in the second half of their lives—the preference of most boomers in their 50s, according to a new national survey. Both the guide, *The Boomers' Guide to Good Work: An introduction to jobs that make a difference*, and the survey, *MetLife Foundation/Civic Ventures New Face of Work Survey* are available free online at [http://www.civicventures.org/publications/booklets/boomers\\_guide.cfm](http://www.civicventures.org/publications/booklets/boomers_guide.cfm). The MetLife Foundation/Civic Ventures New Face of Work Survey is available at <http://www.civicventures.org/publications/surveys/new-face-of-work.cfm>.
- **Generation We: How Millennial Youth are Taking Over America And Changing Our World Forever.** Eric Greenberg and Karl Weber. Free downloadable book at [http://gen-we.com/sites/default/files/GenWe\\_EntireBook3.pdf](http://gen-we.com/sites/default/files/GenWe_EntireBook3.pdf)
- **Youth and Students in Service Resources.** Collection of resources that includes volunteering by young people - children, teens, and college age - plus service-learning and family volunteering. <http://energizeinc.com/art/subj/youth.html>

## Strategy #9 -- Review and revise your theory of change

### Theory of Change Resource List

- **Making Sense: Reviewing Program Design with Theory of Change.** ActKnowledge and The Aspen Institute Roundtable on Comprehensive Community Initiatives. [http://www.theoryofchange.org/pdf/making\\_sense.pdf](http://www.theoryofchange.org/pdf/making_sense.pdf)
- **Mapping Change: Using a Theory of Change to Guide Planning and Evaluation.** This brief guide, the latest in the GrantCraft series, explains why grant makers use theories of change to guide their questioning, unearth assumptions that underlie their work, establish common language, and develop strong action plans. Contributors to the guide also describe how a theory of change sets the stage for evaluation by clarifying goals, strategies, and milestones. Highlights include: What a theory of change looks like; Theory of change vs. logic model; Mini-case study: theory of change and strategic planning. Go to: <http://www.grantcraft.org/index.cfm?fuseaction=page.viewpage&pageid=808>
- **Theories of Change and Logic Models: Telling Them Apart.** ActKnowledge And Aspen Institute Roundtable on Community Change. [www.evaluationtoolsforracialequity.org/evaluation/resource/doc/TOCs\\_and\\_Logic\\_Models\\_forAEA.ppt](http://www.evaluationtoolsforracialequity.org/evaluation/resource/doc/TOCs_and_Logic_Models_forAEA.ppt)
- **Theory of Change as a Tool for Strategic Planning.** Andreas A. Anderson, The Aspen Institute Roundtable on Community Change. [http://www.theoryofchange.org/pdf/tocli\\_final4.pdf](http://www.theoryofchange.org/pdf/tocli_final4.pdf)
- **Theory of Change Website.** ActKnowledge. <http://www.theoryofchange.org>.
- **Urban Institute Outcome Indicators Project.** The Urban Institute has developed and applied an Outcome Framework to program areas (examples: Transitional Housing, Youth Tutoring and Mentoring, Emergency Shelter, Advocacy). For each program, there is a sample mission statement, an outcome sequence chart, a table of candidate program-specific outcomes, and data collection strategies with suggested data sources for each outcome indicator. Go to: <http://www.urban.org/center/cnp/projects/outcomeindicators.cfm>.

### Systems Thinking Resource List

- **The Systems Thinker,** Williston, VT: Pegasus Communications, Inc. Published ten times a year. <http://www.thesystemsthinker.com>
- **Leverage Points,** Williston, VT: Pegasus Communications, Inc. FREE <http://www.pegasuscom.com/lpsub.html>.
- **The Thinking Page: Systems Thinking Resources.** [www.thinking.net/Systems\\_Thinking/systems\\_thinking.html](http://www.thinking.net/Systems_Thinking/systems_thinking.html)
- **Dr. Roger Greenaway's Annotated Bibliography on Learning Organizations.** <http://reviewing.co.uk/reviews/learning-organisations.htm>

## Strategy #10 -- Adopt regional thinking and problem solving approaches

### Regional Thinking Resource List

- **Alliance for Regional Stewardship.** The Alliance for Regional Stewardship (ARS) is a national, peer-to-peer network of regional leaders working across boundaries to solve tough community problems. They come from business, government, education, and the civic sectors, but they share a common commitment to collaborative action and achieving results. <http://www.acce.org/ars/about-the-alliance-for-regional-stewardship>.
- **Megacommunities: How Leaders of Government, Business and Non-Profits Can Tackle Today's Global Challenges Together** by Reginald Van Lee, etal. Based on interviews with over 100 leaders from around the world. The book, accompanied by a website introduces a new cross sector collaborative framework framework for reaching solutions to today's thorniest problems. Written by four senior consultants from global consultancy Booz Allen Hamilton. <http://megacommunities.com/26655021>
- **Valley Vision.** Valley Vision is a nonprofit association of people and organizations working to secure the social, environmental and economic health of the Sacramento Region. <http://www.valleyvision.org/organization/faq.html>

## Frank Martinelli, The Center For Public Skills Training

Frank Martinelli has over 35 years of work, training and consulting experience with a variety of nonprofit and public sector organizations. He is president of the Center for Public Skills Training where he specializes in strategic planning, governing board development, nonprofit capacity building, and community partnership and alliance building. Since 1976 over 25,000 professional staff, board and other volunteer leaders have benefited from Frank's practical, results-oriented training and consultation.

Frank served as a member of the national faculty of The Learning Institute, a joint venture of the Society for Nonprofit Organizations, PBS, United Way of America, and the University of Wisconsin-Extension designed to deliver training through a range of emerging technologies. The Learning Institute, faculty and partners were the recipient of the American Distance Education Consortium 2000 Award for the "Certificate of Excellence in Nonprofit Leadership and Management Satellite Series" He has provided training and consultation to over 1800 organizations in the US including the YWCA, Peace Corps, Head Start, The Points of Light Foundation, Association of Volunteer Administration, the American Camping Association, Wisconsin Association of Homes and Services for the Aging, Evangelical Lutheran Church in America, Medical College of Wisconsin, Greater Milwaukee Committee, American Lung Association and others. From 1981-1992, Frank served as Coordinator of THE RESOURCE CENTER, a major provider of training to nonprofit groups in Southeastern Wisconsin.

A graduate of the University of Wisconsin with an M.S. in Urban Affairs, Frank has done numerous workshops on nonprofit management topics with special emphasis on involvement of the Board of Directors. Frank has written extensively about the management of nonprofit organizations and is a contributing author to the New Directions publication by Jossey-Bass, "Small Nonprofits: Strategies for Fund Raising Success." He has been trained by the Peter F. Drucker Foundation in the use of the Organizational Self-Assessment Tool. Frank has completed the Advanced Board Consultant Training Program offered by BoardSource, formerly known as the National Center for Nonprofit Boards. Frank has recently completed the Distance Education Professional Development Certification Program offered at the University of Wisconsin and is presently developing a number of web-based and other distance learning offerings for nonprofits.

Frank served as a community organizer for the Citizen Action Program (CAP) in Chicago and as a founding organizer and staff director of the Milwaukee Alliance of Concerned Citizens. He also served as Senior Training Consultant to ACTION/VISTA from 1977 to 1981. In addition to his professional work, since high school days, Frank has played key roles in founding and leading a number of nonprofit organizations. In 1993, the Wisconsin Association of Nonprofit Organizations established The Frank Martinelli Volunteer Achievement Award. The award recognized excellence in voluntary service to the nonprofit sector in Wisconsin.

### **For more information contact:**

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**NOTES:****Key Takeaways**

**Which of the 10 strategies will you focus on?**

**Next Steps**