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innovative nonprofit solutions

Inside This Issue

Our Mission

The INS Group helps nonprofits, government agencies, and faith-based institutions create innovative solutions to build their capacity and sustain their programs and services.

We accomplish this by assessing, designing and implementing organizational development strategies that focus on improving effectiveness and enhancing the organization's sustainability. The INS Group was established in 1999 and provides organizational development and capacity building services nationally.

Message from the President

Are you, like me, finding it hard to believe that the year 2013 is here? It seems it wasn't that long ago that we were preparing for the change in millennium. And here we are, more than a decade later. Many things are different and yet, at the core, many are still the same. It's this combination of tried-and-true and inevitable change that you'll find in this edition of the newsletter.

The onset of a new year brings an opportunity to look at your organization with a fresh perspective. In *Seven Things Every Nonprofit Should Do in the New Year*, we share our list of recommended resolutions with you. Don't fret: they're all very achievable!

To flourish, nonprofits must adapt. However, change can bring on both positive and negative reactions. *Managing Through Change* takes you through the process of change and offers suggestions for how to navigate it effectively.

Creating a Giving Guide for Your Nonprofit provides direction for developing an asset that can be used to gain new donors or take the ones you already have to the next level. Giving channels, while second nature to many of us, can become confusing to donors; a well-thought-out giving guide can help demystify charitable donation options and increase contributions received this year.

Happy New Year and best wishes for growth and success in 2013!

Ruth

Ruth A. Peebles, President &
Founder of The INS Group

Seven Things Every Nonprofit Should Do in the New Year

According to a study conducted by the University of Scranton and published by the Journal of Clinical Psychology in December 2012, 45% of Americans make New Year's resolutions. Though only 8% of those are successful in reaching their goals, the study also showed that people who explicitly make resolutions are ten times more likely to achieve them than those who do not proactively state their goals.

With that in mind, we've compiled a list of seven things every nonprofit should resolve to do in 2013.

1. While fresh in your mind, compile a list of your organization's key accomplishments in 2012. Include items such as major program activities, achievement of fundraising goals, event or membership participation statistics, and number of people served.

2. Update or, at a minimum, review your strategic plan. Given your 2012 accomplishments, are you moving in the right direction? Are the strategic goals previously set still valid? If not, it may be time to revise your plan. (Don't have a strategic plan? Get one!)

3. Assuming you've done 1 and 2 above, you know where you've been and you know where you want to go. Does your current staffing model support your plan for 2013? Now is a great time to review and revise your organizational structure and position descriptions. Ask for staff input during this process and you're sure to learn a lot.

4. The very nature of nonprofits demands the ability to provide detailed financial reporting. Review your chart of accounts to ensure your accounting structure supports the capture and reporting of data as needed. Be sure to take into account not only what is necessary internally, but also what is required by grantmakers, auditors, prospective donors, and local, state and federal governments.

"Continual improvement is an unending journey."

- Lloyd Dobens

5. Revisit your acknowledgement letters. Many organizations miss this obvious opportunity to strengthen their connection with supporters, opting instead for boring tax receipts. Update your donor and volunteer thank you letters to include relevant 2012 accomplishments, calling out how their contribution made them possible. Highlight upcoming events and engagement opportunities. And as boring is it may be, include the requisite charitable contribution statement for cash and in-kind donations so the letter can be used a tax receipt.

6. Review your technology to determine if it contributes to, or detracts from, your organization's productivity. Are your office computers outdated? Are you more than two versions behind the current operating system or software release? Even the IRS says the useful life of a laptop or desktop is three years. Resources such as TechSoup make it easy and financially feasible to keep your hardware and software current. (Also check out *Software Solutions for Nonprofit Management* in our Summer 2012 newsletter.)

7. Speaking of technology, it's time to freshen up your website. Add prior year accomplishments, change photos used on the site, and bring staff and board biographies up to date. Verify resource listings and links to other sites, and update your wish list. If you have a donor recognition page, add the names of new donors. And don't neglect t your calendar of upcoming programs and events; keep it current to ensure visitors to your site have the information they need to get involved.

Managing Through Change

Whether we create it or not, change is a constant. In the nonprofit world, this can be good – even great – as most of us work toward positive change. Organizational growth will inevitably require change. Moving from the way things have always been done to new practices can, while necessary, can also be difficult, threatening, and unwelcome. Good managers will anticipate resistance and develop techniques to overcome it. To do so, they need to understand the change process.

While there are many ways to look at change, one of the most straightforward models was developed in the 1940's by psychologist Kurt Lewin. Lewin's Change Model consists of three stages: Unfreeze, Change (or Transition), and Refreeze. Mind Tools, a website that provides online resources for career development, advocates Lewin's model. The following descriptions of the model's stages have been summarized from the Mind Tools website.

Unfreeze: In this stage, which is often the most difficult, the status quo is challenged to prepare the organization to accept the change as necessary. In this step in the process, the organization must re-examine its core values and behaviors to create a controlled crisis which will drive forward progress.

With organizational upheaval, managers should expect strong reactions, yet they must stay true to the intended direction. Wavering between "what is" and "what could be" will only undermine the process, increase stress, and delay the change.

Change: With old ways no longer acceptable, people have to look for new ways to work. Hopefully, they begin to adapt to and embrace the new direction.

As change occurs, individuals evaluate how they will be personally impacted. Those who benefited from the status quo will demonstrate the most resistance and managers should expect that not everyone will choose to stay through the transition. This stage may take a while to get through and communication is paramount to overcoming conflict and uncertainty.

Refreeze: Once the new direction is defined and generally accepted, the organization will stabilize. At this point in the process, new practices are institutionalized, the organizational structure is solidified, and systems are developed for sustaining the change.

The change process can take a toll on all involved so, once this stage has been reached, managers should take every opportunity to celebrate success.

To learn more about Lewin's Change Management Model, visit the Mind Tools website.

The INS Group can assist you with:

Organizational Assessments

Strategic Planning

Strategic Fund Development Planning

Board Development

Grant Writing and Research

Board Fundraising Training

Executive Coaching

Project Management

Marketing Communication

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Upcoming Webinars

Go to www.theinsgroup.com to register for the following online learning events. The cost per seat is $30.

Grant Writing Made Simple
Tuesday, January 29, 2:00pm - 3:30pm ET

Grant Management and Compliance: Beyond the Award Letter
Thursday, February 28, 2:00pm - 3:30pm ET

Program Evaluation: Possible, Practical, and Painless
Thursday, March 21, 2:00pm - 3:30pm ET

Visit www.theinsgroup.com to learn more about these educational opportunities.

Upcoming Classes/Workshops

Community Health Impact Investment Workshop
January 14-15, Atlanta, GA
Ms. Peebles will serve on a panel to discuss why strong organizational management is important and explore key themes from the nonprofit management, board, and staffing perspectives.

The ABCs of Grant Writing
NC Community Foundation
January 22, 8:30 am – 2:00 pm ET, Lumberton, NC
February 1, 8:30 am – 2:00 pm ET, Jacksonville NC

Nonprofit Fundraising
Duke University Nonprofit Certificate Program
January 30, 9:00 am – 4:00 pm ET, Durham, NC
February 6, 9:00 am – 4:00 pm ET, Greensboro, NC
March 6, 9:00 am – 4:00 pm ET, Durham, NC *(Intensive Track Program)*
April 24, 9:00 am – 4:00 pm ET, Durham, NC *(Intensive Track Program)*

Grant Writing
Duke University Nonprofit Certificate Program
February 27, 9:00 am – 4:00 pm ET, Durham, NC

Advanced Grant Writing
Duke University Nonprofit Certificate Program
April 10, 9:00 am – 4:00 pm ET, Durham, NC

Grant Writing, Management, and Compliance
Duke University Nonprofit Certificate Program
April 17, 9:00 am – 4:00 pm ET, Danville, VA *(Intensive Track Program)*

Creating a Giving Guide for Your Nonprofit

Many nonprofits produce annual reports that describe their prior year accomplishments, financial status, and leadership. However, an important forward-thinking document, the giving guide, is often overlooked.

Giving guides are targeted toward prospective donors. They provide valuable information to assist the donor in determining their optimal giving situation. A guide can also streamline the donor cultivation process, as the information is readily available and in a form that can be easily presented.

Foundations and educational institutions generally produce the most sophisticated guides, as their giving options and charitable applications can be very complex. However, you need not be intimidated at the thought of producing a document that will serve both the interests of your nonprofit and its donors.

A basic giving guide consists of the following components:

- Synopsis of the organization, including the problem it is attempting to solve and the plan for accomplishing its mission. This should be written in such a way that a prospective donor can easily envision how his donation could help reach the ultimate goal.

- Descriptions of the programs, services, and initiatives provided or undertaken by the nonprofit. These provide information for a donor to determine if their gift is to be restricted – designated for a specific purpose – or unrestricted. If you are an organization that allocates funds to other nonprofits, you may want to provide information for each organization you support.

- How the nonprofit spends the money it raises. Donors are particularly interested in overhead ratio – the percentage spent on administrative and fundraising tasks – and the allocation of funds towards programs, services, and initiatives.

- Information on ways to give and the types of gifts that are accepted. Giving vehicles may include cash, stocks, bequests, trusts, retirement assets, life insurance, property, business interests, and estate assets, among others.

- Tax implications and considerations. While the giving guide can offer basic guidance in this area, tax laws and regulations change frequently. The document should include a recommendation that the donor consult a professional advisor for the most recent tax and legal guidelines.

- How gifts will be acknowledged. For example, donations at a certain level may warrant building naming rights, inclusion in a giving circle, a listing in the annual report, or a written acknowledgement letter.

- Testimonials from those impacted by the organization. Benefactors want to know their gifts will make a difference. Document firsthand accounts from those who have benefited from your nonprofit; example beneficiaries might include a scholarship recipient, breast cancer survivor, or trade association member.

Quite simply, a well-designed giving guide can simplify the giving process for both the donor and the nonprofit and, where possible, should be a fundamental component of the organization’s library.