Executive Director Institute
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Notes prepared by Mission Spark, LLC for the VITAL Project
kara@missionspark.org

Primary Institute Topics

- Resource Development
- Program Evaluation
- Leadership Transitions

Key Questions & Issues Generated by Participants

Resource Development	Program Evaluation	Leadership Transitions
Diversification of resources—how to grow new areas	How make evaluation requirements more specific to program outcomes	Larger slate of opportunities for leadership development within and between organizations
Identifying additional sources of funding	Database effectiveness—questions with ALICE	How to move forward as a new ED
Ability to convert base constituents to individual donors	Setting up new programs with evaluation processes in place	How to energize vision—orient new team
How to gain a bigger return on events—deciding when to do events and when not to	How do we know if we are doing a good job—detail of program success	How prepare agency for future transitions
How maintain fund development momentum; i.e. board members exhausted after silent auction	New best practices—how identify and integrate into programming and operations	How to honor the past while creating buy in to move forward
How to secure major donors	Differences between outcomes and outputs—how get to outcomes	Better ways to share leadership with the board
Strategies for developing a volunteer base	Client tracking—are we actually doing what we think (and say) we're doing	How maintain funding during transition
How to partner with government funders	Tools for honest, holistic evaluation	Founder leadership transitions—special considerations
Balance resource needs over time, short term cash needs with longer term funding sources	What's a program vs a service	Importance of diversity—fit with populations, draw from community pipeline
	How do you evaluate ill-	How prevent constant

	defined services	transition and turnover
	Measuring outcomes on prevention work	What is the board's role during transition; how continue to develop the board
	When changing programs, what should evaluation look like—strategies to get good data	
	Need to redesign old evaluation tools for greater effect	
	How create evaluation that meets funder needs while still meeting client/org needs	

Peer Generated Ideas & Questions by Topic

Resource Development Ideas for Effectiveness

- Use main contact list to break donors and potential categories and appropriate messaging
- Inform interested folks about program success and impact through targeted communications
- Achieve cost savings through fundraising software, one recommendation from the group included Salesforce
- Find out who else is doing donor development well that is a like-organization or program
- Look for ways to create buy-in with donors by creating personal experiences like tours, and sharing personal stories
- Make sure you follow up with new contacts by categorizing potential donor status post-engagement and follow up with targeted communications
- Have board members write personal notes on fundraising letters to people they know
- Inform donors about your communication tools like your blog or website so they know where to look for updates
- When you're planning events make sure you know what else is happening in the community that may overlap with your date
- Understand how donors' businesses connect to your work and strengthen that connection, possibly through corporate sponsorship or in-kind donation of services
- Go through your entire donor database to screen for how you can expand organizational relationships beyond a single personal contact

- Provide personal follow up to any concerns circulating about your organization or regarding rumors and make sure messaging is consistent; don't let these things go un-checked
- Make sure you issue timely thank you notes within 24 to 48 hours after donation or event
- When organizing a silent auction make sure you know auction items' values and research what your audience is likely to want -- this will make the auction more effective
- When planning an event: pull in other key players/constituents who can help with the event but who aren't current donors. This helps build your potential pipeline of donors and invested individuals

Questions around Resource Development

- When starting a new program how do you put an appropriate resource development plan in place to sustain that program post-grant funding? How do you make sure you have enough resources to sustain a program over time?
- How do you make time to create a resource development plan? What samples, resources, and templates exist that can make our lives easier?
- How do you transition a donor when their personal contact at your organization leaves?
- When things have been perceived to have gone wrong in the organization before, how do you message to key partners and donor base to address those issues and maintain support?
- How do you determine if an event will be successful in your target marketplace?

<u>*Program Evaluation Ideas for Effectiveness*</u>

Ideas for design and delivery program evaluation

- Gain clarity on messaging, why ask what you're asking? When you achieve clarity and your questions, questions endure over time
- Make sure you leave a place for partner/client feedback and all of your evaluation tools
- Consider using out-of-the-box methods to communicate results like infographics; consider flipcams to tell the story by clients that also address evaluation questions but in their way and using their voice, this can also be material for an annual report
- Consider that clients in crisis don't really have appropriate focus/ capacity to reflect in a survey—assess right time to engage a client in evaluation or track state of client (crisis or not, so data can be compared later)
- Make surveys are inclusive and capture data on who's not able to be reached, this allows you to focus outreach in the future and also lets you put your findings in context

- Measuring changes in a client's perspective regarding their awareness of services or improved education as a result of programming is an important outcome you can measure and most directly influence
- Consider searching for money to support program evaluation as this provides org value to improve the information you collect, you may want to build into grant applications or seek specific donor support to help you fund program evaluation
- Take a long-term view program evaluation, you may be able to look at short-term outputs and outcomes today but comparing time will give you the greatest sense of your impact and what changes you can make
- Work with funders to move them in the direction of program-centered program evaluation rather than funder- centered evaluations, or find ways to meet the needs of both programs and funders when collecting information

Questions around Program Evaluation

- How can all questions from different funding sources be combined and streamlined into one survey or tool?
  Ideas
  - Ask funders if you can combine questions and still get the information they need and meet the requirements:
    - if yes, combine questions;
    - if no, integrate funding data into the existing tool and code accordingly in database
- How can we get good quality data from clients in crisis?
  Ideas
  - Use a medical pain scale with visual emoticons like the ones used in hospice care or hospital environments to first assess a client's state of mind before they go engage in the process of answering questions; Collect information over time and compare how clients in crisis response to questions versus how clients not in crisis respond to questions and compare the quality of that information. This may be able to be shared with funders for future evaluation changes.
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Leadership Transition Ideas for Effectiveness

Setting a new ED up for Success

- Negotiate as an executive director when you are in the hiring process, asking advance for help and support and negotiate that support in advance
- Develop a plan as an executive director and then work to gather feedback and buy-in. from board members; gives a straw man document for you to discuss and review

- Pro-actively review bylaws every three years as well as board member commitment plans
- make your board more effective by adhering to the bylaws, creating board member job descriptions, and refocus roles and responsibilities based on these descriptions; also consider gathering third-party advice to assist with difficult board/executive director relationships
- When you begin as a new executive director it is difficult to know the full story and getting the full story is hard to do, take time with staff and board members to have them describe their individual roles, concerns and opportunities for development

Community and staff succession planning

- Focus on creating an inclusive culture with empowered employees who have a voice; consider what you can do with benefits and salary and opportunities for staff to promote or move laterally within the organization
- Use existing DV council to promote across-organizational collaboration to share resources, needs, skills, opportunities, performance evaluation and consistency plans
- Provide opportunities to your staff to shadow another employee or receive mentorship, pair leaders with staff across agencies
- Broaden scope of connecting and creating opportunities, especially for rural communities -- Don't just rely on listservs
- Make sure that community members know the organization not just the face of the organization
- Help the community take ownership over the organization so that it doesn't feel like it belongs to a founder or individual but instead is a key service and attribute of the community as a whole

Questions around Leadership Transitions

- How do you help a community transition to a new executive director after that person has been in place for 15 to 20 years?