NATIONAL SMALL NONPROFIT SUMMIT

APRIL 7-8

nsnsummit.org
Values Based Growth
Expand Your Leadership Effectively
Traditional Organizational Lifecycle

How it often goes

1. Founding
   Organization begins to address need in the community that is a passion of the founder

2. Expansion
   Programming serves more people in more ways and this leads to more funding

3. Refinement
   Program evolves as learning occurs and non-programmatic elements expand

4. Plateau or Grow
   Nonprofit either continues marginal expansion or focuses on growth opportunities

5. Steady or Close
   Organization falls into regular rhythm with sustainable funding or closes (forced or by choice)
Stakeholders Advocating for Growth

Major groups

Board

For either prestige and/or due to corporate mindset, believe more is already better; how they judge performance

Supporters

Foundations and donors want to see dollar going farther and measure this by how much more you are doing

Staff/Clients

Organic groundswell of calls to meet more need, new needs, or needs in a different ways
## Advocates #1: Board

### When leadership wants more

<table>
<thead>
<tr>
<th>Performance</th>
<th>Prestige</th>
<th>Personal</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Used to judging executive performance on growth</td>
<td>• Being on a board may be a social boost or to tell colleagues</td>
<td>• Personal values have been taught to see more as better</td>
</tr>
<tr>
<td>• More money or product (e.g. impact)</td>
<td>• More nonprofit does, more to share with others</td>
<td>• Predisposition to get excited or impressed by bigger or better numbers</td>
</tr>
<tr>
<td>• Less focused on quality in many cases</td>
<td>• Needs talking points about work if not growth</td>
<td></td>
</tr>
</tbody>
</table>
### Advocates #2: Supporters

#### When money wants more

<table>
<thead>
<tr>
<th>Success Metric</th>
<th>Landscape</th>
<th>Expectation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Aware of work but may lack nuanced understanding</td>
<td>Most nonprofits are leading their “win” section with growth talk</td>
<td>Personal values have been taught to see more as better</td>
</tr>
<tr>
<td>More is an easy metric to gauge success</td>
<td>Used to using it to compare organizations</td>
<td>Predisposition to get excited or impressed by bigger or better numbers</td>
</tr>
<tr>
<td>From growth to doing more with current population these stories are easy to grasp</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Traditional Reasons for Growth

Why organizations prioritize it

**More Money**
- More programming often directly or indirectly leads to more money
- Bigger budget leads to more legitimacy in many nonprofit and supporter views
- Very much pulled from corporate mindset

**More Visibility**
- Working in more places with more people, and often more money, will lead to more opportunities for exposure
- This includes media which often won’t authentically include smaller groups

**More Impact**
- Can be due to desire to meet more need or serve current clients deeper
- Correct to an extent but can become an issue when ignoring other nonprofits in the space or believing work to do a “savior effect” for clients
New Reasons for Growth

What we should prioritize

Values

• Consider organizational values
• Is the new project or expanded work in line with them?
• How will those values be ignored or lived out by growing this way at this time?

Sustainability

• Focused growth may make an organization more sustainable
• Focused pauses may as well
• Obviously not an either/or but a both/and
• Small growth to achieve funding might still be reality some times

Difference

• This is similar to the impact motivator, but with some restraints
• Not trying to be everything for clients
• Also looking for partnerships before launching new things
• Spurred by learning from community
Your Values

Not always defined at an organization

1. Word or Phrase
   Trend is toward short phrase, often including a verb

2. 3–7
   There should be a few but small enough to truly engage with regularly

3. Description
   Include a short one sentence description to add context

4. Public/Private
   At some point, should make these known to let folks know what you stand for
Defining Your Values

Figuring out what matters most

**Perspectives**
- Get internal and external feedback
- Ask questions about how they think about the brand
- Staff often ones to draft these
- Board vital to involve

**Feeling**
- Ask them to consider how they want clients to feel during program
- After program?
- How they feel doing the work?
- How they feel when describing the work?
- How the work makes them feel about the world? Community?

**Highs**
- Ask staff to consider specific moments
- Most impactful day on job?
- Favorite day in the office?
- Work story they tell the most?
Putting Values into Action

Ensuring values are embedded into work and growth

1 What is it?
Grid of values and major programs or workflows

2 Match
Want to write down how each value appears or impacts work on each project

3 Individual
Have staff do this first by themselves

4 Discuss
Then bring everyone together to look at this

5 All
Don’t limit this to program work, if appropriate expand to administrative work as well

6 Refresh
Do this again with a retroactive mindset in the Fall
Option #1: Prioritizing Growth

<table>
<thead>
<tr>
<th>More Community Impact</th>
<th>Less Community Impact</th>
</tr>
</thead>
<tbody>
<tr>
<td>Easy Win</td>
<td>Rally Cry</td>
</tr>
<tr>
<td>Small growth or quality initiatives that are reasonable to do</td>
<td>Hard and strategic goals that can make a difference but need to get staff excited by</td>
</tr>
<tr>
<td>Filler</td>
<td>If Required</td>
</tr>
<tr>
<td>Cut these out when possible to save time for the team</td>
<td>Regulation or funding may make you but otherwise skip</td>
</tr>
</tbody>
</table>

What to do first

Less Challenging

Challenging for Staff
## Option #2: Prioritizing Growth

### What to do first

<table>
<thead>
<tr>
<th>Internal</th>
<th>Public and Strategic</th>
</tr>
</thead>
<tbody>
<tr>
<td>While never hiding work, these updates will get less attention publicly from us</td>
<td>Market these with top billing as work we are doing</td>
</tr>
<tr>
<td>No</td>
<td>ROI or Redline</td>
</tr>
<tr>
<td>Unless required no reason to do these</td>
<td>Consider if growth is crossing your redline or if ROI makes it worth it in long run</td>
</tr>
</tbody>
</table>

- Less Supporter Care
- More Supporter Care
Goal Setting Process

Involving all sides of leadership

1. Community
   Staff listens to what community is and is not saying

2. Staff
   Prioritizes opportunities based on community need, team energy, and strategic direction

3. Discuss
   Staff presents to board in financial form (budget) and narrative (work plan) annually

4. Board
   Asks questions and ultimately approves plans
Final Tips and Tricks

Leading with values

**Staff Retreat**
If you haven’t since 2020
good time for a retreat

**Find a Peer**
Find another nonprofit
leader to hold you
accountable

**Explain**
If growing due to less than
ideal situation, be honest
with staff

**Gradual**
Especially if in strategic
plan already may take time
to gather buy-in

**Hollow**
Avoid making values and
never revisiting
Next Steps

Growing the right way

1 Identify
   Where you are currently planning for growth

2 Define
   Why you are pursuing those opportunities

3 Grid
   Use values grid to evaluate efforts

4 Plan
   To reconfirm values if not voted on in past two years

5 Prioritize
   Use values to help choose which growth goals to pursue

6 Reconvene
   Get board and/or staff together six months from now