

# Vision: Leadership Focus



September 2008

## Fast Focus Tips

- Exceptional boards approve activities that can be realistically financed with existing or attainable revenue.
- They ensure that the organization has the infrastructure and internal capacity it needs.
- They help shape and participate in fundraising strategies and activities by opening doors, attending events, generating contributions, and making personally meaningful contributions to ensure success.

Find the book,  
\*[www.boardsource.org](http://www.boardsource.org)

## Sustaining Resources

### From Average to Awesome Financial Strength

Tina and Tony met to refine the board agenda one more time. This meeting was going to focus on one of the most important roles a board plays, ensuring adequate resources exist to carry out the mission. But this time, Tony, veteran executive director, and Tina, board chair, wanted to take the conversation further and embrace the **8th Principle of Governance to Power Exceptional Boards: Sustaining Resources**. It says:

*“Exceptional boards link bold visions and ambitious plans to financial support, expertise, and networks of influence.”*

As a life-long United Way volunteer, Tina wanted her legacy to be one of empowered strength and also to support their most ambitious vision yet.



Tina observed, “Tony, I know you’ve always wanted to do more in the community, and there have been plenty of obstacles. But with stronger board support, we can take a stand and make our deepest wishes for our community a reality.”

Tony smiled at the prospect, “I knew when you first started out as a torchbearer telling a story of United Way’s work that one day you would inspire goals never before articulated! With a real commitment from our board and aligning our budget to clear strategic goals, we can make it happen.”

Tina chimed in, “Let’s confirm buy-in to our new vision and why we have been so excited about it. Let’s pin down what each board member is willing and able to do, and then see where we might need reinforcements. Our board members can play stronger ambassador roles than has been their habit. Let’s define what that means in very practical ways. Our board is a resource we can use more effectively. I can see everyone being so much more involved and gratified about their contributions in the future.” With firm nods of their heads, Tina and Tony walked confidently into the board meeting.

Indiana Association  
of United Ways  
3901 North Meridian, #306  
Indianapolis, IN 46208  
800-457-1450  
[www.iauow.org](http://www.iauow.org)

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**12 Principles of Governance That Power Exceptional Boards**

1. Constructive Partnership
2. Mission Driven
3. Strategic Thinking
4. Culture of Inquiry
5. Independent-Mindedness
6. Ethos of Transparency
7. Compliance with Integrity
- 8. Sustaining Resources**
9. Results Oriented
10. Intentional Board Practices
11. Continuous Learning
12. Revitalization

*Vision* features one ‘power’ principle in each issue.

# Unleash Your Vision by Aligning Resources Dynamically

Did you ever wonder what it would be like to set a previously un-attainable financial goal and to strengthen your community in a previously unimaginable way? Some have seen evidence of that reality with the community impact initiatives. What are the key differences in that effort that made it exceed all expectations? One vital factor is connecting an awesome vision to a corresponding strategic fiscal plan. Only bold vision inspires bold financial goals.

Annual budgets are no different. In order to make things happen, the budget must directly support the mission and vision. What excites you about your current vision? What’s new and different about it? Does your budget really support the activities necessary to accomplish your goals and reach your vision?

Consider these examples:

- You have a firm commitment to collaborate on three very demanding partnerships. Does your budget reflect the staff time needed to nurture, shepherd, and monitor each partnership to its potential? What other tasks or strategies could use greater support?



- United Ways are no longer tied to paying out every dollar to a finite set of traditional agencies. Thinking strategically may actually serve the community better in the long run than single-agency-allocations alone. For example, giving \$1000 to a food pantry meets an immediate need. Supporting 2-1-1 with \$1000 may reach twice as many (or more) citizens to find the food pantry and a whole range of other services they may need during any given year. Funding 2-1-1 is a community service not an overhead expense. Based on this example, what strategic funding decision might you consider?

- What “awesome vision” is just below the surface of your board conversations and organizational work? What are you really trying to accomplish? How could an inspired strategic financial plan make things happen? Be sure to include non-financial resources to leverage the financial ones.

<b>Responsible Boards x</b>	<b>The Source of Power =</b>	<b>Exceptional Boards</b>
Approve balanced budget Accept fundraising responsibilities and contribute personally Develop and monitor investments Promote organization in community	Creative and diverse revenue sources Enthusiasm for bold visions and ambitious plans Active involvement in solicitations Intellectual, social, political, and reputation capital	Generate increased revenue Extend programmatic capacity of organization Improve organization’s standing in the community

***“If opportunity doesn’t knock, build a door.” – Unknown***

## Time Out for Meaning Making

In the cover story, Tina and Tony happen to illustrate three newer ways that describe United Way’s work.

- **GIVE:** board members, other volunteers, and the community give in targeted ways to support a clear goal.
- **ADVOCATE:** board members reach out to the community in new ways as ambassadors and to leverage their connections.
- **VOLUNTEER:** United Ways make the best use of boards and expand their networks to make things happen, supplementing other volunteer efforts to realize the vision.



**“To get your ideas across use small words, big ideas, and short sentences.”**  
**-- John Henry Patterson**

## Appreciative Corner: Core Vision and Assumptions



Embracing bold new vision takes courage and leadership. One person can champion a cause and bring it to a receptive light. But it takes everyone to bring it to life and take it to completion. In reality, strategic new funding decisions are never easy. Each board member arrives with an impression of how United Way works and how it doesn’t. Here are some board discussions that support “bold visions” of exceptional boards and how to introduce new directions.

- ◆ At its core, United Way exists to serve community and make lives better. Think of an example of how your United Way has made lives better in a short term way. Now think of an example of how lives were made better in a lasting way. What are the differences? What difference in funding and other supports made the “lasting” difference? Who was involved in making it happen? What if you could get more of the “lasting” results and reduce the need for the short term fixes? How and what would you target?
- ◆ As a board member, what inherent assumptions did you bring with you that guide your board service? What has changed locally or in the world since you first acquired that view or impression? Organizations are living entities. What could you do that would complement the community’s current strengths and support its needs even more effectively? What assumption might need to evolve?

**“The problems of the world cannot possibly be solved by skeptics or cynics whose horizons are limited by obvious realities. We need men and women who can dream of things that never were...”**  
**-- John F. Kennedy**

**Indiana Association of United Ways...Bringing Indiana United Ways together to help them create a successful future.**

**Relationship/Association - Members actively engage with their IaUW neighbors and peers around issues and experience, contributing to higher performance.**

- 63 member organizations
- 4community2 matching grant program
- Roundtables and collaborative assistance

**Learning/Training - Members involved with IaUW learning opportunities are strengthened to improve organizational functioning.**

- State Leaders Conference and recognition programs
- 4community2 technical assistance and training
- Regional conferencing and national program hosting
- Software user groups
- Vision Leadership Focus newsletter
- Indiana Nonprofit Resource Network

**Research & Development/Innovation - Members have improved capacity to engage organizational technology with confidence.**

- NP&AS, Nonprofit Processing & Accounting Service
- www.iauw.org and other Web site features

**Representation - Members receive substantial grant support and have strong state-level relationships.**

- Partnerships and strong relationships with Indiana University Center on Philanthropy, Indiana Coalition for Human Services, Indiana Voluntary Organizations Active in Disaster
- Public Policy
- United Way Council of States and other national involvement
- Indiana 211
- Youth Philanthropy Initiative of Indiana
- United Way of America

Indiana Association of United Ways Staff		Nonprofit Processing & Accounting Services Staff	
Roger Frick, President	317-921-1399	Briann Black	317-921-1358
Mike Cabat	921-1395	Emily Campbell	921-7526
Lisa Hanger	921-1393	Stephanie Coon	921-7507
Lucinda Nord	921-1394	Kathy Downing	921-7509
Sue Koralewski	921-1390	Cheryl Mitchell	921-2240
Kathy Quarles	921-1396	Sue Odom	921-1359
Iverne Russell	921-1391	Rita Wootton	923-1882
Kimberly Sokolow	921-1398		

## Give it a Try: Schedule a Fiscal “Check-Up” for Stronger Financial Strength

Do you **fully understand your organization’s financial strength**? What are your strong suits? What is your weak link? Where are your new opportunities? Do you have a plan for targeting new opportunities?

Is your **financial plan aligned with your strategic, operating, and allocating plans**? Look over all aspects of your budget and what the dollars actually help you achieve. How is the budget crafted? Is the process firmly tied to supporting your mission? For example, do you have sufficient staff dollars to support all the collaborative work planned or underway? Do you have resources set aside for taking advantage of new opportunities that support your mission?

Do you work to **leverage intangible resources**? What/where are they in your community? Make a list of them. How can you connect with them? How can you maximize their effects and influences? How can you inspire them to work with you for mutual success? Set goals to connect with new intangible resources each year.

**Ensure sufficient infrastructure to carry out your mission**, including internal, technological, facility, processing, and oversight mechanisms. Where could you **work smarter** by accessing greater technology or tapping systems and services that would reduce routine functions and save valued staff and volunteer time?