

## Welcome to Module Three

• • • • • Welcome to module number three, everybody. You know what that means. This is your last module before we start module number four. And in module number four is where we get into the real meat and potatoes, which is fundraising. So that is super exciting. Module number three is about staying organized.

## Importance of Staying Organized

• Really important especially because one of the guiding principles for this course was that you should be able to do a lot in a very efficient amount of time. I don't want to say a small amount of time, because for every person that's different, if you are a person who is full time nonprofit, that means that's 40 hours a week. And if you're a person who's doing this on the side, that might mean one hour a week. And so, I really wanted to give you the tools to stay super organized.

- Even if you are just starting, even if you haven't yet started, it is so crucial because if you don't have the appropriate files in the appropriate folders, you will not be able to find them later.
- As things grow, you'll need those documents. You're gonna be like, oh, where did I put that login for the bank? Where did I put that IRS form about my 501c3? How can I find my EIN number? So where was that languaging for our mission statement? Keep everything ridiculously organized.

## Setting Up Your Organization

Okay, so we're going to jump in. And so you're going to want to really have a place that you can keep all of your things now. This is not as simple as it sounds at all. And it also depends on the size of your organization. You might already have a CRM.

- **CRM:** CRM stands for customer relationships management, which is exactly what it sounds is how to manage your customers. As a nonprofit, you have people who are benefiting from your nonprofit that you might need to keep track of. You also might have people. You also need to keep track of your donors. That's another form of CRM that you're going to need.
- **Research:** And you're going to have to do a little bit of research about what is the right fit for you.

## Recommended CRMs

I like to give you three tools here that will hopefully be a good fit for at least part of your organization or possibly your whole organization. I'm going to mention three different CRMs today. I've heard very good things about, for non-profits.

1. **DonorPerfect:** Look it up online.
2. **Bloomerang:** Also look it up online.
3. **Zoho:** Which is probably a better fit for a slightly larger nonprofit.
  - All of these, of course, cost money. All of these, of course, have a variety of different tools. And you will have to do some research to see if that's a good fit for you. And I'm happy of course, to discuss that on our coaching calls.

## Nonprofit Navigator CRM

There are two other options I'd like to share with you.

1. **Nonprofit Navigator CRM:** The CRM that we have custom made for you. It is simple and it's easy to use. Obviously, we built it with you, the nonprofits, in mind. And so hopefully that would be a great fit for you. And so we're going to jump into that now.
2. **Google Sheets CRM:** If you are looking for something a little bit simpler right now and not looking for anything too complicated or that is out of your budget, the high level CRM, then we've coded a Google sheets that you can use as well. And I'm going to show you a training video here.

## Staying Organized Tips

And if you don't want to use that, that's okay too. I'm just going to say a few pointers here in general about staying organized.

- **Hire Help:** One is if this is not your thing, make sure to just hire someone on Fiverr, Upwork, etc. to do it for you. There's a lot of free templates online, but if you're looking for something that specifically matches what you do, it's so easy to do in Google Sheets and you can pay someone \$50 to \$100 online to make it exactly how you want it. It's most likely not worth your time to start playing with it and not having it work, etc.
- **Website Creation:** Also in terms of creating a website, first of all, same idea. You can hire someone online to make a basic website for you, and it does not have to break the bank. And I know plenty of people anywhere from very simple websites to the most complicated website you could imagine that can do that for you. And so you can be in touch with me about that as well.
- **DIY Website Tools:** If you are going to be building your own website, there are a lot of free websites out there that will use AI to create a lot of it for you already. There are Framer, Squarespace, Wix. Those are some of the popular ones. Google also has a free website builder and especially if you're going to be using Google Sheets, that can integrate very easily and pretty well. And so you could check that out too. Make sure to

look at YouTube tutorials on these things. If you are going to be building it on your own, they're typically five, 10 minutes long, and very simple and saves you a lot of time if you're trying to learn how to do it for the first time.

- **Google Workspace:** If you are going to be setting up a Google workspace so that you have your own domain name and you have your own @, like I have akiva@nonprofitnavigator.pro, you can set that up for free.

## Additional Tools

If you're a nonprofit and I'm going to be putting the link here on the bottom. And in general, don't forget you can use ChatGPT or other AI tools to code things for you to create code for Google Sheets. To create templates for you. And there are, like I said, a lot of free templates online.

## CRM Options Overview

📌 📌 📌 📌 📌 Alright, always great to have options. So you've watched our CRM using the high-level platform. If you are looking for something a little bit simpler right now and not looking for anything too complicated or that is out of your budget, we've coded a Google Sheets CRM that you can use as well. I'm going to show you a training video here.

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## DIY Website Tools

If you are going to be building your own website, there are a lot of free websites out there that will use AI to create a lot of it for you already. Some popular ones include:

- Framer
- Squarespace
- Wix
- Google (also has a free website builder)
- Especially if you're going to be using Google Sheets, that can integrate very easily and pretty well. Make sure to look at YouTube tutorials on these things if you are going to be building it on your own. They're typically five to ten minutes long and very simple, saving you a lot of time if you're trying to learn how to do it for the first time.
- **Google Workspace:** If you are going to be setting up a Google workspace so that you have your own domain name and you have your own @, like I have akiva@nonprofitnavigator.pro, you can set that up for free.

## AI Tools for Nonprofits

If you're a nonprofit, I'm going to be putting the link here on the bottom. And in general, don't forget you can use ChatGPT or other AI tools to code things for you to create code for Google Sheets, create templates for you, and there are, like I said, a lot of free templates online.

## Website Presentation

• • • • • Okay, now that you have everything organized, it's time to talk about the front end, the website, what people see when you meet them at a party and you're telling them all about your nonprofit and they say, "Wow, let me see more."

- You give them your website, it's on your business card, it's on your social media status. What are people going to see? So let's talk about your website. After this class, you're going to see a website audit, where we're going to walk you through a website and show you some do's and don'ts of a website.
- We're going to give you that now with me talking and then we're going to do it with an expert, Jonathan, who you'll meet in the next class.

## Key Elements for an Effective Nonprofit Website

### Clarity

- Number one is you really want things to be clear. People should come to your website and immediately know what you're talking about. It should be the first thing they see.
- Tell them exactly why they're here because you have about maybe five or ten seconds to hook them.
- Use language from module one: vision statement, mission statement, value propositions, and core values.
- Make sure the message is conveyed clearly on the website.

### TAPE Framework

#### Trust

- The wording on the website should inspire trust. Visitors should feel confident in your nonprofit's ability to execute its mission.
- Ensure there are no spelling or grammar mistakes. Use tools like ChatGPT to check your copy.
- Use statistics and credible information (e.g., "We have been in the field for X amount of years" or "We have spent over a hundred hours researching and discussing with our local community leaders").
- Include pictures of actual events and testimonials to inspire trust and encourage donations.

#### Action

- Highlight that your nonprofit is taking action and addressing urgent needs.
- Emphasize the importance of immediate action and donations to support your cause (e.g., "There are seniors in our community who are unable to shop, and we are taking action because of it. Donate now to help these people").

#### Passion

- Convey emotion and passion in all aspects of your nonprofit's communication.
- Show why you are passionate about making the world a better place and why people should care and donate.
- Your fundraising pitch should be emotion-based with supporting facts.

#### Encouragement

- Maintain a positive, upbeat tone even when conveying difficult subjects.

- For example, if your nonprofit helps people through mourning and loss, frame it in a supportive and encouraging manner (e.g., "Everyone mourns at some point in their life. We are here to support those people").

### **Summary**

- Number one was clarity.
- Number two is TAPE: Trust, Action, Passion, Encouragement.

## **Key Website Elements for Nonprofits**

### **Number Three: Top Part of Your Website**

- The top part of your website, both on desktop and mobile versions, is your most important real estate.
- This is where your mission statement and/or vision statement should be prominently displayed.
- Ensure the mobile version is updated and check its layout.
- Maintain clarity as users scroll down the page. Ensure an appropriate flow on the website.
- Tabs at the top should be clearly visible and easily navigable.

### **Number Four: Branding Colors**

- Consider your branding colors and the emotions they elicit. For example, orange and blue were chosen for Nonprofit Navigator due to their specific emotional impact.
- Use the link below to explore the significance of different colors.
- Ensure your logo stands out and is aligned with your brand identity.
- There are three types of logos: text-only, icon-only, and a combination of both. Explore free online logo makers or consult with mentors, friends, or affordable freelancers on platforms like Fiverr and Upwork.

### **Number Five: Images**

- Use large, clear images that convey your organization's message. Avoid tiny or cut-off images.

- Preferably use actual pictures from your organization's activities rather than stock images. If stock images are necessary, ensure they are relevant and enhance your message.
- Images should directly support the content they accompany. For example, a picture of an elderly woman surrounded by friends and family would be more powerful than a shopping cart for a senior support nonprofit.

#### **Number Six: Call to Action (CTA)**

- Define the CTA(s) on your website. CTAs should be clear, prominently displayed, and use distinct button colors.
- Examples include a "Donate" button or a sign-up for a newsletter.
- Ensure CTAs align with your organization's current goals. If the primary goal is building awareness, prioritize newsletter sign-ups or social media follows.
- CTAs should be immediately understandable and placed strategically within the website's flow to guide users toward desired actions.

#### **Number Seven: Setting Up Your Donate Button**

- Connect your donate button to a bank account for seamless transactions.
- Use platforms like GiveCloud, which can be set up for free and integrated into your website.
- GiveCloud connects to Stripe, also free to set up, though it takes a percentage of each transaction.
- This setup should take less than an hour.

#### **Number Eight: Displaying Outcomes**

- As users scroll down, showcase the outcomes of your organization.
- Use impactful statistics and stories to convey the difference your nonprofit is making.
- Highlight achievements, such as "We have helped 150,000 seniors buy a million tons of food this year."
- Ensure the emotional aspect of your work is evident.

#### **Number Nine: Clear Contact Information**

- Ensure contact information is easily accessible.
- Provide a professional email, not a personal one, and consider including a phone number or texting option.
- Place contact info clearly, either at the bottom of the page or prominently on the side.
- This acts similarly to a call to action, guiding users on how to get in touch.

#### **Clarity and Simplicity**

- Emphasize clarity and simplicity throughout your website.
- Avoid clutter and excessive content; less is more.
- Consider your own browsing habits and aim for a clean, easy-to-navigate website.


### **Number Ten: Ensure Functionality**

- Verify that all elements on your website work properly.
- Test buttons and links to ensure they lead to the intended content.
- Ask friends to review your website for functionality and provide feedback.
- Leverage input from people with expertise in marketing or web design to enhance your site's effectiveness.


## **Next Steps**

In the next video, we will demonstrate what a professional website audit looks like, providing further insights into optimizing your nonprofit's online presence.

## **Welcome and Overview**

 **Welcome everyone.** We're joined by Jonathan Shyman from the company Optimize, which specializes in creating websites for nonprofits. If you're in need of this service, you can get a special discounted rate by contacting Optimize through Nonprofit Navigator. Additionally, they offer a critical service—a website audit for only a hundred dollars. This is essential for any existing nonprofit website to identify unnoticed mistakes.

## **Importance of a Website Audit**

 Jonathan will demonstrate what an audit entails using an actual Nonprofit Navigator client, YTA. The audit will cover how the website appears in Google searches, the significance of the title tag, and common errors that could be deterring potential visitors or donors.

## **Detailed Audit Walkthrough**

### **Initial Impressions and Title Tag Importance**



- **First Impressions:** The first stage of the audit examines how the website appears in Google, highlighting the importance of the title tag which helps Google and users understand the purpose of your site.
- **Confusions and Errors:** Issues like unclear separation of content for different audiences and default icons can confuse visitors and detract from the nonprofit's brand.

## Website Navigation and Content Clarity

- **Homepage Analysis:** The homepage should clearly communicate what the nonprofit is about and how visitors can engage. The current homepage lacks this clarity, leading to potential donor and participant confusion.
- **Content and Flow:** Important sections like 'Meet Our Students' and administrative details are misplaced or poorly presented, hindering user understanding and engagement.

## Mission and Visibility

- **Communicating the Mission:** The mission page needs to be more direct and engaging to effectively convey the unique aspects of the nonprofit. Current content does not adequately tell the nonprofit's story or engage potential supporters.
- **Visibility and Credibility:** Successful media coverage is underutilized on the website. Prominently displaying such achievements can significantly enhance credibility and trust.

## Donation Page and Call to Action

### Donation Page Critique

- **Functionality Issues:** The donation page suffers from technical issues and lacks clear donation options, which could discourage potential donors.
- **Transparency and Context:** There is a lack of information on how donations are used, the impact of contributions, and options to donate in honor of someone—all crucial for building trust and encouraging donations.

## Comparative Analysis with Successful Nonprofits

- **Successful Examples:** Jonathan contrasts the YTA site with the Neshama Foundation's site, which uses clear, engaging content and visual hierarchies to guide visitors through the site and to the donation page effectively.
- **Best Practices:** The Neshama Foundation's website provides a stellar example of how transparency, context, and user-friendly design can significantly improve donor engagement and contributions.

## Conclusion and Next Steps

📌 **Summing Up:** Jonathan's insights underscore the importance of a well-optimized website as your nonprofit's digital footprint. A good website is not just about aesthetics but also functionality, user experience, and strategic content placement.

📌 **Moving Forward:** Improving your website is crucial for your nonprofit's success. You're encouraged to contact Jonathan for personalized advice or reach out to me for a connection. We look forward to seeing you in the next module where we will explore more about digital strategies for nonprofits.

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no no. I want a transcription. dont miss out on ANY words I said! I just want you to orgnize it and create subject lines  
ChatGPT

## Introduction to Nonprofit Web Development

### Welcome and Introduction to the Session

📌 **Welcome everyone.** We're joined here with Jonathan Shyman from the company Optimize, and they create websites for nonprofits. If that's something that you are looking for, you're going to get a special discounted rate by contacting Optimize through us here at Nonprofit Navigator. Additionally, what they do, which is something incredible, it is something that everyone should be doing right after watching this video because it's only a hundred dollars, is an audit of your website.

### Importance of a Website Audit

If you already have a nonprofit that already has a website, there might be a ton of mistakes you're making that you have no idea you're even making. So Jonathan is going to walk us through what an audit looks like for an actual Nonprofit Navigator client, YTA. Jonathan, the stage is yours.

## Detailed Audit Walkthrough by Jonathan

### Analyzing Google Search Visibility

Hi, we're going to do a mini audit to give you a taste of what your audit could look like. And really the first stage of looking at a website is looking how it shows up in Google. So I went and Googled YTA, which is going to be the example we're looking at here. And I'm already kind of off to a little bit of confusion. So first of all, this here that says, YTA: HOME, this is the single most important part of your website in terms of how Google understands it and how people coming to Google understand your site. This is called the title tag, and Google uses this title tag to try to get a one-sentence understanding of what the point of your website is. And the words you're using in that title tag are critical for Google to decide where to show you. And as you see, even

if Google figured out what I'm looking for, it's critical for the user because this is for sure the first thing their eye notices, and this one sentence can make or break whether they think they are making it to the right website or not. YTA also is boys and girls, and you can see that, I think it's two different campuses, but that is really not communicated here and can really lead to even more confusion and possibly people just being like, oh, this isn't, this isn't for me. It's not the right website I'm looking for, and they abandon their search or end up going somewhere else.

## **Identifying Errors and Improving Brand Recognition**

I can see there's a typo here. It says academicsindex one word. Just a lot here. This is called the favicon. And instead of using something of their own, they left this default W, which is the website builder that they're using. That's also just taking away from their brand and taking away from people recognizing them. And now let's go into the website. So first of all, you can see here at the top, in the tab, that's that same mistake. The favicon is not showing correctly. When I come to the website, I'm kind of in the same situation. I come to this, I, you know, and this is the most important real estate on your website. That first moment when someone comes to your site, do they have a clear understanding of what your nonprofit is all about? And how they can take action, participate, donate, whatever it is. And here I'm left with none of those. I just see the logo big with some images. So I've gotten the point that from these images, maybe I would assume that clearly it's focused on education. It definitely seems like it's education on boys. I see a big call to action, called YTA girl, which I don't know what context that is. Is that going to take me to a different school? How does that play with the boys? If I scroll down, I don't get a hundred percent clearer picture. So the new system of parents meeting click here, this doesn't seem like the right place for this. I'm coming to the website to potentially learn more about your nonprofit, your program, whatever you have. And this seems like some sort of sideline detail or something that should maybe be coming in the footer, or I'm not sure what, but this isn't the right flow.

## **Enhancing Content and Navigation**

Then we have meet our students, which there's no. I don't, I don't even know what this means. If this is showing, meet our students, that students in the picture. We have this. There's just the connection. Doesn't connect to the picture to me. And then a nice letter from the Roshni Shiva, but this is done in a way where now I have to kind of commit and read this more with more of a focus. It's not being presented to me in a visual way, in a way that I can kind of just eyeball and quickly understand what, YTA is all about. Then finally, now we start getting a little bit more focused on what is this nonprofit, here's about us. We focus on Torah, we focus on general studies. Oh, now I finally understand it's a school, and a little bit of our faculty, but this is, and there's tiyulim. So maybe it's, it's a little bit of an out of the box school. You know, this picture is cropped in a weird way where kids' faces are cut off. And really, I would love to be able to click on this and see the picture as a whole, see happy kids. I see there's custom programs. I still haven't really gotten a sense of what is this school all about? Is there something unique to the school? Are they, maybe they're not trying to be unique. And they're just trying to be a good

regular school. I don't even throughout the whole homepage, I don't have a full picture now I see. And at least stands for you or Yirushalayim Torah Academy. Maybe the name gives me a little bit more of a sense, but not a whole lot. Also, these read more are like a little bit. If you want people clicking on these, they need to be a different color. They need to be a button they need to be, you need to be guided towards. The next step.

## **Conclusion and Next Steps**

So, I'm going to still try to learn a little bit more. I'm going to go over to a mission and administration. And then here again, you know, I'm being presented. With a, with not the most visual, of an approach to explain my mission. There is some sort of branding here with these, design elements, which is cool. And then I do get mission. It is bigger. It is shorter. It is a little bit more in, in, direct. But it's not really telling me enough of a story. So on this page, I think the Shiva could do a better job of saying here's what makes us unique. Here's here's the, how we're breaking out of the mold. Here is, you know our, our success rate. Here's how many students we have. Here's why you should trust us. Here's, you know, things from other parents are saying or programs or whatever. Mission is just not telling me your story in an updated in enough depth. For me to be, you know, sold and convinced and excited about your program. You have in the news, which I think this is so fantastic. You were in the Jerusalem post, you were in a reach of it. Why you hiding this on the bottom of your mission statement? And the mission page, I would bring this back to the homepage and I would put it like scrolling, maybe scrolling across the top. We are, you know, written up in all these news outlets that gives a lot of credibility, a lot of trust. And a lot of importance to, to what you're doing. I'm going to skip a lot of other pages.

## **Next Steps and Contact Information**

We're going to jump straight into the donation page. And here I'm again, I, you know, you want me to donate and you've given me zero, zero context. About what, where, where are these donation funds going? How are they helping the nonprofit? How much are the expenses that the nonprofit has that they're raising money for? Is there a goal. Is there any sort of social proof? Is there any sort of transparency? I see this huge button and accept when I click on it. It's no button at all. I see this plus sign. And when I click on it, nothing is happening. And I see this tiny PayPal button all the way in the corner. Now here, when I come to this page, I can't make my donation at first of all, if I don't have PayPal, I might be discouraged thinking I need a PayPal. Cause I just see the PayPal logo and I'm like, oh, I don't know PayPal. It's true. You don't need PayPal, but not everyone might see that. I don't see any way to change this into dollars. I don't see any way to donate in memory of someone and honor of someone. I don't see any way to cover the fees, which nonprofits can make a lot. A lot of extra they can raise the average donation by asking the donor to cover fees. And I just think that that's a, and it's also just a totally, I'm not waft the YtA website. And I don't necessarily feel like, you know, I'm still part of that experience of what I had when I'm on the website, I'm going to spend a minute or two contrasting this to a website that we've done. So here I Googled Neshama foundation and you can see here, you know, When, when I, they show up in Google, it says a dignified burial for

every Jew. I understand in one sentence, what is the point of this organization? The next page is about us. And it tells a better story. When I come onto this page again. I'm greeted with a visual that right away. I understand what is, what is their focus? There's a big sentence here that is just very clear. And then it tells me more details we assist for, for end of care. End of life care. If I scroll down, I get some social proof from a prominent rabbi in this industry of cover Kadesha. I'm a strong call to action. There's no time to wait, donate to a mace mitzvah campaign. And just more clarity. In what this organization does in a more storytelling way, you can see here there's icons, there's images, the hierarchy between the different fonts and the font weights, the sizes. This is all done. Very intentional here. You're telling me about my, the, a nonprofit is talking to me about their impact, about how much change they've they've done over the years. There's a video, which is always good. And if we just jump to the donation page, you can see here, they, you give me a lot of context, right? The whole point is we never have to turn people away. You're telling me some transparency. There's no one on payroll. A hundred percent is is going to the, is going to the nonprofit. What are we doing with your, I. We're educating about how to do a kosher burial. We're preventing, we're preventing Jews from having cremations. And we're providing a, for people who want to do may Smiths, but in the correct way. When I come here, I can now, I stay on the website. It's a more fluid experience. And of course I can do some of the things that I mentioned earlier. It's gonna make me fill in some stuff, so I'm not going to bother with that, but you could make a donation and honor someone in memory of someone you can cover the fees. A lot of the basics there. And that is the basics of a website audit.

## Closing Remarks and Next Steps

📌 **Thank you so much, Jonathan, that was super insightful.** And as you can see, a website is your digital footprint. It's how people find you. It's how people's first impression of you. And it's really, really important that it looks great. Parts of an MRI, easy to do. Parts of them are not as easy to do. But it's very easy to get the right direction and that's something you can reach out to Jonathan to do. Reach out to me and I'll connect you to Jonathan. All right. See you in the next module.

## Budgeting Essentials

### 📌 Introduction to Budgeting

Okay, everybody. Here we go. Let's get it. We were talking today about budgeting. All right. So budgeting is about tracking your money in and your money out. Now, depending on who you are, are you someone with just an idea who slowly building it?

You might not have that many, that much money coming in or that much money coming out and one Google sheet might be enough for you. You might be part of a multi-million dollar organization in which case I am sure. You already have lots of bookkeeping and accounting software you might be somewhere in between and if that's the case you can use, of course our CRM that we've built for you, or you can use our Google sheets that we built for you. Or you can build your own. And that is up to you.

## Important Points in Budgeting

- 📌 Number one: Don't spend money you don't have.

Okay. Number one, this is super important. Don't spend money you don't have. Don't do it. I have seen it too many times. Really, really, really people saying like, oh, this idea is so good that it's for sure going to bring in \$10,000 and guess what? They lay out thousands of dollars. And they don't make \$10,000. If they're lucky, they cover the costs that they already laid out, sometimes their own personal money. It's just not a good idea. Obviously, some times there's going to be expenses before the actual event, right. If you're having an event and you need to rent a hall, And you haven't done any, any, you know, you. You haven't sold any tickets yet then of course, you're going to have to put down to the \$500 or the thousand dollars for the deposit.

What you need to recognize though, is that first of all, make sure that money is in the bank and don't lay out that money or even better get a donor to cover that money. Say, listen, we really want to do this idea, but it's going to cost a thousand dollars in deposit. Would you be that person that's going to be the linchpin to making this a success or not.

And that could be a great pitch, right? Ultimately minimize the amount of money that you're putting up upfront. Or if you are putting up up front, make sure that it's in your bank account and it's expendable and that there's money.

That something else isn't going to get sacrificed because of it. Okay. That's number one. Don't spend money. You don't have

- 📌 Two is make sure your budget actually goes through every item that's on your that's either in your organization, or if you're planning a budget for a specific event, really walk through.

If you're doing an event, walk through that entire event in your mind, or write it down and be like, we're going to need to buy extension cords. Like we didn't even think about that. We need 10 of them. They're each 20 bucks, like make sure that you walk through the hallway, locate where to walk in is going to be lights in the side.

There's going to be food on the right. We're going to need a speaker or we're going to need a stage. All right. Four, we're going to, who's going to be bringing in the stage whatever it is that the event is, again, depending on the size of it. If it's something that you're organizing, then you're going to need to do this.

If you're hiring an event coordinator, they'll do this for you. But ultimately making sure that every dollar has an address and that you know where things are going, same thing with your organization in general. You're getting money in as a from your donors. You want to make sure that every money is every dollar is allocated towards a specific thing.

If that dollar is allocated towards. An event towards salaries towards overhead. You know, whatever it might be.

📌 Number three. I like to do this putting 10% as miscellaneous, right? There's always going to be things you haven't thought of. Some things might cost more. You're going to want to have a cushion in your budget. And so put 10. Percent in your budget as miscellaneous. For budgets and I've done that, or even led are pretty significant sized budgets.

We're talking about half a million, to a million budgets where we're still hazy and a lot of the details. And I know that those details are going to be costly. I'll put even 15% as miscellaneous

📌 📌 Number four, make sure that salaries are part of that budget, even if. Certainly if it said the global budget of the organization, but even if it's an event budget, right?

Like let's say the event hard costs are \$65,000, but then there's all the manpower that goes into it. There's no hours you're putting into the hours that you're doing. The rest of your staff is putting into it. Those are costs that are associated with the event. And so certainly if you're writing it for, if you're writing a grant or asking a donor, you're going to want , that cost of the event to say not 65,000, but 70 or \$75,000. So that when you go to a donor, you're writing a great, you can say this event is going to cost us \$75,000.

Yes. \$10,000 of. That is your salary, because guess what? To remind you, you are the most important employee here. If you weren't paid, you couldn't get the job done. And then the job wouldn't get done. So we are very important here.

📌 And number five is check yourself. And this is where your mentor or friend can come really in handy or someone else on your team. Check it and say, am I making any assumptions here? Right? Like earlier I'm assuming a hundred people are going to come for sure. We're going to have us a hundred people.

That's an assumption. Is that based on evidence? Do you, have you really thought that through? Is there anything that shows you that your, that your odds are very good? You're going to have a hundred people. Another assumption is that I've seen people make like, oh, we'll probably give. Give out X amount of dollars in scholarships. Is that true?

Like you might do. Are you going to need more? Are you going to need less? Oh, a caterer. Ah. Ah, they probably cost like \$15 per person, like, cause I remember one time we went out for dinner and it was \$15. Like, is that an assumption? They're. It might be a lot of other costs there. And so check your budget on the assumptions.



Okay, lastly just a common traps I've seen people fall into as have I, over the years.

One is being over precise on a budget item and something that you actually don't know what that item costs. We kind of talked about it a little bit. Right. And you're, you're getting all this pressure to maybe like, get a bunch of going, get the budget going, but get the budget going. But you just don't have an accurate estimate yet.

And so you, you say it's going. to be. \$5,000. And like, you're exactly precise about that in the budget. And then it turns out to be \$10,000 or the other way around, it turns out to be \$2,500 and the budget is really skewed. Right. It might be. nice to say, oh, we have extra money, but it's not really accurate that that's like, That's great when it happens, but you shouldn't budget in that way.

So make sure to do the research needed find out, right? You don't want to have margins that are too off in either direction.

### **Project Management Strategies**

📌 📌 📌 📌 All right now, we're going to talk about project management. , in terms of the technical aspects, you have our project management tools. There are other project management tools. And so that's for you to really decide, determine which one. Feels good for you and it's easy for you to use.

📌 Think about the project that you're taking on, whatever that might be. Does the project align with your goals is question number one. Countless times have I've seen this and I've fallen into this trap as well that someone will have an idea and it'll bounce around, bounce around. And we find ourselves during this big project.

And some at some point, someone will say, why are we doing this again? You know, like, does this really align with where we're going, wait, this is really aligned. Aligned with what our goals. are? What is the main. Point of view and his project. So really think about whatever project you've taken on right now, whatever events, whatever within your nonprofit does. That fit.

Does it really align with the goals of your nonprofit? And again, goals change. Write your goals. Six. Six months into your nonprofit. The profit will be very different. Different than your goal, six years into your nonprofit. And that's. Fine. And that's good. But make sure that. It aligns

📌 Okay. When you're doing that project, whatever the project is, try. I try to find someone. Who has done a similar. Thing.



So if you're. Putting on an event, find someone in your community or online that has done a similar type event and say, Hey, can I make it a half hour meeting with you? I'd love to hear your experience. And what were some things that worked and what are some things that did not work? You're probably not reinventing the wheel.

And even if you are reinventing the wheel there's someone who's invented similar wheels. So always do the research. It's worth it. On what other people have learned along the way, and it will save you an enormous amount of time and money and effort.

📌 Okay. Now in terms of your project it is important to have really good people along for the ride with you. Volunteers can be a game-changer with your project. Here are some tips about how to find volunteers and manage volunteers. So in terms of finding volunteers, That is your network.

Those are going to be people who have maybe have benefited from your nonprofit. It was, it might be people who are close to you. And just want to help you out. Those might be high schoolers or college students who need community service hours.

Those might be your board members or friends of your board members, right? You might make it a volunteer event out of it. That's some ways how to find your volunteers. You can also look online, you know, post to social networks. You might not want to have total strangers. It's important that it's people that you trust.

📌 and in terms of managing your volunteers, so number one, make them feel like Kings and Queens I mean these are , people who are giving from their time to help you and your nonprofit. And so treat them like Kings and Queens, write them. Thank you. Letters, send them pizza to their house, send them flowers that weekend, you know, whatever it is that you're going to do in your budget already, if you know, you're going to be having volunteers make. Make sure that there's a few hundred bucks there for recognition and making them feel like Kings and Queens, right. If you could think about it this way, your, your paid staff is paid in dollars and they're there to work, but your volunteers are paid in recognition and appreciation.

Making them feel really seen and recognized and appreciated. Goes. an, enormous way. To having them come back and volunteer in the future and having them feel good about the volunteer work that they just did.

📌 The next item is, think about. What aspects of the project should I be doing as the nonprofit director or nonprofit director of development or wherever you are in your, in your organization? What aspects am I giving to a staff member paid or part-time what aspects am I giving to a volunteer?

And what aspects am I outsourcing? Maybe on Fiverr or Upwork or task rabbit, or any of these apps?

Something that's maybe a bit more high level that really needs your strategy and your vision might be you something that can, that can be a little less complicated, but needs to be executed with someone with who's within your organization.

Maybe it's dealing with sensitive information. Or someone who's going to be putting a lot of hours into. It might be a paid staff member. Outsourced on Upwork or task rabbit might be just something as simple as driving something around or designing a logo or some graphics.

But you could have a volunteer design, graphics, certainly a volunteer can drive something from point A to point B. So something to keep in mind. Certainly as you're building a project and all the multiple levels of it. At what areas that you have to do them?

What areas are you paying someone to do it? And what areas can be volunteer?

And then of course it could save your organization money. It's another way of getting people's buy into your organization. It's another way of giving the people the opportunity to feel like they're giving back because we all want to give back.

So there's a lot of aspects to think about with that.

📌 Next item create a schedule for the project, right? We're going to have milestones at week three. We're going to be here by week five. We're going to have booked the hotel by week eight, et cetera, et cetera, make sure that there's certain milestones along the way so that, you know, you're keeping your project on track.

📌 If you're finding some difficulties with this and idea a is called reverse storyboarding which is essentially you start with the end in mind.

The end is this big event at a. In a, in a hotel room with a thousand people there and you say, okay, that's in six months from now, what did we have to do five months from now in order to have gotten there and you start working your way backwards, right? That sometimes can get your brain working in a slightly different way, which will help you come up with the ideas and, and bullet points that you need to put it all together.

📌 Don't be afraid by the way, to ask for help on this. You know, if this is not your strength, then have a board member, step in and say, listen, we really need to do expert at our organization? Can you help us come up? With the checklist, right? Some people live on checklists.

They love checklists. They dream about checklists. I am one of those people. I love checklists. And so, if creating checklists. are not your thing. Reach out to your network and say, who can help me create a checklist for this incredible thing I want to do for humanity?

📌 Next, who is in charge of what we kind of talked about that with the dividing up, if it's you staff, volunteers or outsourced on an app or something along those lines, but now, now allocating, okay, Bob, you're doing this Cheryl.

You're doing that. Make sure that everyone knows what they're doing when their milestones are, and, and check in with them and see, do you have what you need in order to accomplish your task? Oh, actually I know you want me to drive and go pick up five pizza boxes, but I actually. My car is in the shop and had you not checked in with them, you would not have had any pizza and what's a life without pizza.

And so you need to make sure that they have what they need. You might want to swap Bob and Cheryl, so that Cheryl goes pee, goes and picks up the pizza.

📌 In general, I have found with project management, both for the people who are executing the project and for yourself in terms of your spreadsheet.

K I S S keep it simple, stupid. I like saying, keep it simple. Silly. We'll go with, keep it simple. Keep it simple. Silly. Say that five times fast. Just keep it simple. No one needs complicated spreadsheets and graphs keep it simple.

It makes everything go much better.

📌 And last is your definition of success, right? You could only have a goal and execute that goal if you know what the goal looks like when you hit it. And so what are your evaluation metrics? How are you going to define that this was a successful or non-successful event or project?

And so was it the amount of people that you had? Is there going to be an evaluation they take before and after, or just after? Can people, send in feedback? Is there going to be attitude changes? Are you. Looking for, is there a physical, Are we going to have said this was successful?

If a thousand people, donated \$5, you. know, what is it, whatever that is, make sure that you build that towards the beginning of their project. And. Check in on it. In the middle of the project. And then again, towards the end of the project and make sure it's still aligning and that you're going to be hitting this project with a clear definition and vision of what success is.

📌 And that you'll know if you hit it or not. And if you don't hit it fully, that's great. That's amazing. That's a learning experience for you to what we call fail forward and learn. Okay. Did we, did we under budget? Did we over budget? Did we overestimate how many people are going to be coming?

Did we think this was a good idea, but everyone else thought it was a terrible idea. Did we not do enough research? You can learn so much from the mistakes you make along the way. Okay. That's it for module three, see you in module four.