



## **Presentations**

The listing below is a sample of the presentations I've conducted over the years. If your organization, coalition, or conference is interested in one of these presentations or a variation, please email me at [jonathan@poisner.com](mailto:jonathan@poisner.com).

### *Strategic Planning in the Real World (best as a 3 hour workshop)*

When it's time to decide what to do, does your organization consult the Magic 8 ball? Make snap judgments based on whatever strikes you as correct at the moment? Or consult a strategic plan, operational plan, or evaluation of past work? Once the province of large organizations, many small and medium sized organizations have discovered the benefit of developing strategic plans and work plans. In this workshop, we will demystify the planning process to focus on the core essentials for small to medium sized organizations. You will leave the workshop with concrete ideas for how your organization can take steps to improve your planning process.

### *How to start and manage a coalition*

None of us have the power to win every battle, every time, on our own. Coalitions can be the best, and sometimes only, way to move forward when facing a tough legislative challenge, an opponent with cavernous pockets, or adverse social norms. But while aggregating our power across a state, region or the country can be highly effective, building and working in a coalition is rarely easy. In this workshop we'll cover how to build and sustain effective coalitions. We'll get tips for determining what type of coalition best matches your challenge, establishing ground rules, and working together cohesively to move your agenda forward.

### *Moving your board from activism to governance and from individuals to a team*

Does your board think of themselves as individuals with an activist agenda they're trying to accomplish via your group? Or do they think of themselves as a team with a shared vision? Are they focused on short-term activism and tactics? Or do they focus on long-term governance and institution-building? In this workshop, I lead participants through a series of questions and exercises aimed at moving a board from individual activism to team governance.

## *Why Organizations Thrive - a compilation of lessons from the front lines.*

Sure, you've been trained on the specific skill-sets needed to be an effective nonprofit leader: fundraising, human resources, board development. But what are the hidden soft-skills – those lessons from the field that cut across skill-sets, but every Executive Director should know. In this presentation, I cover 15 lessons I learned (often the hard way) about how to really be an Executive Director. These range from: Lesson 2: relentlessly focus on relationships, to Lesson 9: Communicate excessively with your board, to Lesson 13: Aim high when hiring staff, and cut your losses quickly.

## *Major Donor Fundraising 101 or 201*

101 Version: You need to diversify your fundraising away from an overreliance on foundation grants, and you know that means major donors. But where do you start? You start with the basics: the elements of a major donor program. We'll walk through each of the major elements, from good research, to identifying prospects, to the ask, to ongoing cultivation. We'll pay special attention to the stories that you'll want to tell as part of the ask.

201 Version: How do you take your major donor fundraising to the next level? In this interactive workshop, we'll talk about how to broaden and deepen your major donor program. Broaden your program by relentlessly expanding the number of people who you're in a position to ask for a major gift. Deepen it by strengthening your relationship with existing donors to allow for larger gifts. We'll talk about the keys to both, with a special attention to how to use the ask meeting to serve both goals.

## *Overcoming the Fear of the Ask*

A tightly focused training on in-person asks for major gifts. In this workshop, we'll demystify the fundraising ask, helping participants become more confident that they can secure major gifts while strengthening their personal relationship with the person being asked.

## *Effective Fundraising Planning/Budgeting*

How do you decide what fundraising strategies to use? In this workshop, we'll look at a range of fundraising strategies and lead participants through a series of questions to help identify which make sense for their organization. When you've decided your strategies, how do you take that into an effective work plan, calendar, and budget?

### *Communications planning*

Communications planning for specific advocacy campaigns is a well-developed process for which there are a lot of resources to help you define your goal, audience, targets, message, etc. There is less help available for organizations thinking about their institutional communications, answering question such as: what is your brand, how do you ensure your communications are building your organizational capacity, how do you decide where to focus your communications staff time, etc. In this workshop, we will walk participants through the elements of a good institutional communications plan and a process to get one developed.

### *Volunteer Recruitment 201*

Organizations often turn to volunteers to perform both back-office administrative and fundraising functions and outward-focused program work. In addition to maximizing the raw amount of "work" done, volunteers can bring to your organization specialized skills, unique voices, relationships in the community, and fresh passion for your cause. Yet, recruiting and managing volunteers comes with an opportunity cost -- time spent recruiting and managing volunteers is time not spent on programs or fundraising. How can you find great volunteers and how do you keep them? What kind of systems and tools can you use that will help recruit, maintain and manage a volunteer force at a reasonable cost in time and money?

### *Elections and your 501(c)(3) status*

Most 501(c)(3) charities steer far clear of anything election oriented. Yet, the IRS does allow 501(c)(3)s (and the individuals associated with them) to engage in elections in many ways that can build the power of the organization. Learn the rules that govern what a 501(c)(3) can and can't do around elections and, as importantly, discuss how to determine which of these legal tactics make sense for your organization.

### *How to make your Fiscal Management System give you information needed to think strategically*

Is your budget and accounting systems a mindless chore? Or is it a powerful tool allowing you to make better decisions? In this workshop, I can lead participants through a quick fiscal management 101 (about 15-20 minutes background) before heading into a longer session aimed at understanding the benefits of a program or function-based budget/accounting system, and key steps an organization should take when putting one together (or updating it).