

Top 10 Points for Board Leadership in Unprecedented Times

COVID-19 has ushered in unprecedented times, and unprecedented times call for unprecedented leadership. Yet no board has successfully led an organization through a global pandemic. To that end, our Compass experts share these best practices based on the current situation and knowledge gleaned from working with boards over the past 30 years. Our team envisions these points as beneficial not just for board members, but for executives and development staff working with boards in these times.

1. Create a New or Adapted Plan for the Near Future

While you may know your organizational goals during times of “normalcy,” do you know what they are in the wake of COVID-19? Identify a new – or adapt existing – plans to help lead in these times. The current landscape is changing daily, if not hourly, so immediacy and efficiency in these plans is key. Unlike a long-term strategic plan, perfection is not the goal but rather a blueprint for effective operations in the near future that answers critical questions.

How can you help the organization to ask – and answer – the most important questions? What specific programs and outreach will be executed that are beneficial to society’s current needs? How will the organization adapt to virtual and additional modes of operations? What is the communication plan, both internally and externally?

2. Communicate Frequently

As a board member, take a proactive stance by seeking out and regularly disseminating news and updates about the organization amongst the leadership. It is critical to stay up-to-speed in such quickly changing times. By answering your phone, replying to emails, and supporting the organization’s communication channels, you are demonstrating your commitment and leading by involvement.

3. Support External Communications

Mission-based organizations must engage, cultivate, and steward their audiences and donors now more than ever. Support these efforts by personally updating and connecting with donors through phone calls, virtual meetings, handwritten notes, and additional means of communication. Share your positive stories that lend themselves to strong and uplifting editorial for member magazines, digital newsletters, and other communication platforms that help promote the mission of your organization.

4. Think Creatively about Resources

Many organizations’ needs have changed in these unprecedented times. Resources, including partnerships, can aide immediately. Conceptualizing new ways to provide resources, forging creative partnerships, and drawing on your circle of influences can connect your organization with changing needs now.

5. Give First

Leaders, especially board members, are often asked to give the most but sometimes it’s about giving first. Making the first gift towards unrestricted or emergency funds not only immediately supports the organization which you care enough about to lead, but provides credibility to the greater audience. An

initial gift in these times can leverage support at-large and philanthropic gifts – especially unrestricted – will carry organizations through this time.

6. Spot Check Your Relevancy

Are you relevant at this moment? Consider how your needs in these unprecedented times create an urgent and compelling case for support. Assess and update the verbiage in use for sensitivity to the moment. Focus on the short-term and actions taken immediately to benefit others while still connecting to your mission.

7. Review Your Investment Policy

Wise investment of your organization's assets is a fundamental fiscal responsibility of the board. Investment policies are a necessary discipline in both good and challenging times. If your organization does not have an investment policy, create one that makes sense for the size and type of your organization. If you have a current investment policy, review it to be sure that it is still appropriate.

Remember that flexibility is key, as we have seen in the face of COVID-19. Emergency funds, unrestricted opportunities, and additional open-ended allocations allow an organization to be nimble in times that we have perhaps not yet even considered.

8. Engage Diverse Perspectives Across Your Board

Your board members are smart, and they are managing and leading other organizations also navigating this pandemic. They are also there to help and to be a full partner. This is the time to fully engage, listen, and learn from their diverse perspectives to make the best and most sound decisions for your organization.

9. Say "Thank You" Quickly

When donors make the quick decision to support your organization in this unprecedented time of need, we must match their speediness in our acknowledgement and follow-up. Engage by writing very timely thank you letters, making a phone call, sending a video, and additional means of virtually expressing the appreciation of not only the organization, but the board for the contributions received. Let donors know that their quick response was noticed and greatly appreciated and that their dollars are making a difference – especially at this critical time.

10. Remain Positive

This is hard! Yet we need to find a place to demonstrate positive leadership. Focus on how your organization can be positioned to be stronger, more resilient, and more relevant. Keep morale strong and keep doing your "good work" well.

About Frank Pisch

Frank Pisch is founder of The Compass Group, advancing the mission of hundreds of organizations through capital campaigns, major gift fundraising, strategic planning, and fundraising counsel. In his more than 40-year career, Frank has secured more than \$4 billion in philanthropic gifts for diverse

organizations including colleges and universities, independent schools, hospitals and medical centers, human service and environmental agencies, youth groups, arts organizations, and trade associations.

Frank is an Industry Advisory Council Member for the Council for the Advancement and Support of Education (CASE); a Certified Board Consultant through BoardSource; and a frequent presenter at national conferences including CASE, the Association of Fundraising Professionals (AFP), and the Association of Governing Boards of Universities and Colleges (AGB).

Frank holds a Master of Arts degree in Organization and Management from Antioch New England Graduate School and a Bachelor of Arts degree from the University of Connecticut School of Education.