

Transcript – Episode 119 - [It's All in the Power of Counting: A Conversation with Shelby Roberts of SSR Advisors](#)

Dolph Goldenburg: Welcome to the Successful Nonprofits™ Podcast. I'm your host Dolph Goldenburg. Today, we will be chatting with Shelby Roberts about evaluation. Today's guest is a principle consultant with SSR Advisors, an evaluation consulting firm, and Shelby and I are going to be talking about the essential advice my mother gave me decades ago. She said, "If you clean as you go along, you won't end up with a big mess at the end of the day," and you know, believe it or not, at the age of ten, I did not follow that advice, and I almost always ended up at the end of the day with a big mess that I then had to clean out. So, Shelby helps nonprofits identify some simple elements of data collection that they can add to their daily routines and weekly routines to make grant preparation and grant reporting so much easier. Think about the beauty of that. You can put easy-to-apply steps into your day that will capture the information you know you're going to need in the not too distant future.

When the time is ready to complete that grant proposal, or if you've already got the grant when the time is ready to complete the report, then you are ready to go, and you can also use this in your major donor work, your PR work, social media everywhere else because you've been cleaning as you went along. Now, I'm excited to share with you that Shelby is one of our two-fer guests because she also brings expertise as a board officer helping implement a strategic plan for an Atlanta-based nonprofit. And I just have to say, be still my heart because I definitely want to dig into that as well. Now, if you're a longtime listener, you'll know that I am a strategic planning evangelists. In over the course of my career, I have been a case manager, a development director and executive director and, of course, now a nonprofit consultant.

And can I say that at absolutely every instance, nonprofits with strategic plans are healthier and more effective than those without. Now, there is a caveat, and that's the plans that are hastily thrown together just to meet a funder's requirement or a board chair who says we need a strategic plan, those plans are pretty much meaningless. A real strategic plan, a process that is immersive that looks at all the moving parts of an organization, requires commitment and resources. Now, you might be saying to yourself, my organization doesn't have the resources. We don't have the 13 or \$25,000 to hire an actual full service consultant in our area. So, hold that thought, and I'll tell you more about that at the end of this podcast. But meanwhile, let us welcome Shelby as we talk about evaluation and strategic planning implementation.

Hey Shelby, welcome to the podcast.

Shelby Roberts: Thanks, Dolph. It's great to be with you here today.

Dolph Goldenburg: So, tell me a little about the kind of work you do as an evaluation consultant.

Shelby Roberts: So, my main project right now is a little bit of an evaluator's dream because I was able to be involved in the writing of the proposal, the writing of the implementation plan, the writing of the evaluation plan. And now, we're coming to the end of the project. So, if you ever ask an evaluator, when should the evaluation begin? it's always before the project does. And so, I've been able to do this with my, um, the main project that I work on right now, which has been really exciting. But what we're going to talk about today is when things don't exactly go that way. And that's the case with most projects I've worked on in my career and definitely with the nonprofit that you mentioned that I'm chair of the board of.

Dolph Goldenburg: So, you say you're doing the dream project right now, but that's rarely the way it works. How does it normally work?

Shelby Roberts: So, normally what happens is you, um, you know, you have a nonprofit, you have some funding, you have a mission, you go out, you are working to achieve that mission through programs, education, delivery, whatever your means may be. And then all of a sudden, you need more money, and you go to fill out a grant proposal. And the grant says, how many people have you served? What were the impacts of your program? And you say, "Oh no, wait a minute. Was anyone counting all of those people that we saw at that last health fair? Was anyone counting how many programs we had last year? Let's dig back through our files. Let's dig back through our emails and see, wait, this staff person left six months ago and they used to run that program. Does anyone know where they kept their information? And then everybody's scrambling just to see what you can put together."

Dolph Goldenburg: But it also seems to me like what you're describing there is more the services that are being provided. Like, like the outputs but not the actual evaluation results of those services. So, you know, you did a program, and a hundred people came to it. What changed for those 100 people?

Shelby Roberts: That's definitely outcomes. My message to your listeners today would be, do not underestimate the power of counting. Counting, yes, is just outputs, but you'll be very surprised how impressed especially some smaller funders. You're applying for five thousand, ten thousand even, you know, \$50,000-dollar foundation grants. Just the fact that you can tell them what you've done in terms of outputs is really meaningful because they know that you're taking the time to pay attention to what you're doing, and then you can start to convert, er, look at, you know, can we can you convert these outputs into outcomes. But then if you can't, I always say too, that's the funding opportunity. So, you can say, you know, we did 31 educational programs last year, 310 people came. That was a 20% increase from the year before. We've heard people are leaving with a value. What we would like to ask you for are the funds to do a pre- and post-surveys, so we can see exactly what that value and impact is and tailor our programs to meet the needs of the community.

Dolph Goldenburg: Let's talk about outcomes in a minute then. Let's stay on outputs. You mentioned just counting as a good thing. What are some easy ways to count?

Shelby Roberts: So, this is my step one that I would tell everybody to do is list everything you do, and then also list the impact that you want to have. So, you know, as you list everything you do, you can start to see, okay, are we counting that? And two, what else could we be counting? So going back to the educational programs, you know, we offer educational programs. Great. Can you count those? What else can you count? Can you count how many people came? Can you count how many resources you handed out? Can you count the number of referrals that you had to come in? So, you start to see how you can kind of form some of these outcomes by just counting over time. You can show the change in your program. So, even if you weren't necessarily measuring, okay, you know, these were the exact outcomes of this educational program, if you can say to a funder, you know, we started with one class three years ago. Now, we're offering 40 classes over the course of a year, and the classes fill up within five minutes of us posting it online. All that is is counting.

Dolph Goldenburg: And so, you know, assuming that especially small and medium-sized organizations don't have really sophisticated databases for tracking the data they're counting, what are some of the ways you recommend people actually track that data? So, as you said, when the program manager leaves and six months, someone's not like, "Oh, where's the data from the program manager?"

Shelby Roberts: Exactly. So, it's always very important to know where you're putting this information. So, that's also usually the thing that comes up. If people are collecting data, which you know, a lot of times you're collecting something, right? Like people aren't just not collecting anything, but it could be just in a pile of worksheets on a table, and no one ever actually entered that information. I definitely would encourage people to make a plan for how you enter that information. Excel is an extremely useful tool and very easy tool to use, especially just for counting, you know. So, if you're putting things in an Excel document or even in a Google Excel doc that can be shared whatever you all use, you know, if you use Dropbox and having shared file on there, if there are multiple staff people entering the same information, it's good to keep it in one file.

If you're the manager of those people, you could have them each have their own files. But if you have access to that and are able to combine it once a month or once a week into the same file, just so you have a process for what happens with the data, and you hold people accountable to that process. We found, in the nonprofit where I'm a board member, we have found implementing this in staff meeting. It was a good way to one, give people something to bring to the staff meeting to share to the staff meeting, "This is what I did since our last staff meeting." And then the manager is able to record that data there.

Dolph Goldenburg: And so, you said excel is good. You know, I also know organizations that have had pretty decent success with Salesforce, which is pretty easy to build out. And I think they give like 10 licenses to nonprofits.

Shelby Roberts: Yeah, you can use a more sophisticated program, but I use Excel for the large project that I'm working on right now. You know, it's not a perfect means, but it was easy for the staff entering the data to use. They were familiar with it. They didn't have to learn a new program. And then I can do the analysis I need on the backend fairly easily, and I can copy it also easily into a different type of program if I need that. So, if Salesforce is working for you and you have Salesforce, that's by all means an option and a great way to enter data. But if you don't have that, Excel can work just as well.

Dolph Goldenburg: And so, when you're copying that Excel data and do another program, what program are you using?

Shelby Roberts: Really for the data? Excel can do a lot of things if you, so I use it for all of my complex analysis. Um, you know, you can also use like SPS or SAS, but for the type of analysis that I do, most of the time Excel is just as useful.

Dolph Goldenburg: So once organizations have got that counting thing down and there reliably counting their outputs, how should they be thinking about moving toward a really tracking outcomes?

Shelby Roberts: Outcomes can be sometimes a scary word or a tricky word when you start to think about, you know, what does that mean for us? Well, most of the time your long-term outcome is your mission, right? That's where you can find your first outcome. What are you trying to do as an organization? But you're not going to be able to show, you know, we ended hunger. You know, that's not going to be an outcome that you're going to necessarily show progress on every six months. So, start to look at those outputs. And think what are some short and medium-term outcomes that we can show from these outputs? So for example, if you have a service that you're offering, do you want people to come back? Is that an outcome you can measure? You know, we have 30% repeat customers. So, different things in

those outputs that become your short- and medium-term outcomes. So you can show the funder what progress you're making.

Dolph Goldenburg: So, can you give some real-world examples of organizations you've worked with that have implemented outcome measurements and the types of things they've tracked?

Shelby Roberts: Sure. So, one really big project that whenever I came onto it, I was doing this kind of list in my head what are our outputs? What are our outcomes? Our biggest output was doing this survey with large employers about improving their wellness programs to be focused chronic disease prevention. So, we were doing the survey, and the staff were working with that organization to make changes. And you know, I had all these things that I could count. I could count all the different changes they were making, but then we [weren't] doing the survey again like a year later to show the change. So, that was a really easy way that we were looking at all these outcomes or outputs and thinking about what outcomes we wanted and thought, well if we just implement this survey again a year later or two years later and show the change in the score, all of a sudden, we have an outcome.

Dolph Goldenburg: Right. I love that because that's totally low-hanging fruit. That should be really easy to implement as long as you still have access to this clients or patients.

Shelby Roberts: Exactly. Yeah. And these were, you know, relationship building clients that we had. So, they had been working with them. It was just that we weren't using our same tool to measure again to have that true evaluation-based outcome rather than saying... and they implemented this policy, which is great to say, but whenever you can show the tool two times and show the change in the score, then that becomes a little more powerful.

Dolph Goldenburg: I also love the fact that it's longitudinal because it's a year later as opposed to like a onetime presentation when you do a pre and post. Yeah. You know a lot of people remember stuff 90 minutes later, but how does it actually impacted them?

Shelby Roberts: And you know for smaller programs, one, you could do that though if you aren't doing a pre and post survey. That's another thing where you can look at and say, we have this service that we're offering. What if we all of, you know, surveyed people when they came in and when they left. And that can seem really daunting to nonprofits sometimes. Especially, you know, if you're serving a high need population, you don't want to burden people coming in with a survey and then again when they leave with a survey, but set a plan for it, let's say let's just do it on Saturday and see what happens and do it with this small group of people and then maybe it's not... What I generally find is that people are not as hesitant to take a survey as the staff feel that they might be.

Dolph Goldenburg: Well, one of the other things I think you're kind of alluding to and is really, really critical is okay, it's also possible to kind of say, okay, we're going to take this month and you know, throughout this month we're going to do pre and post when people come in and you can probably extrapolate the data from that month to the other months as well. When you talk to funders, you can say, okay, you know, we took, we took the month of May and you know, we did this pre post, here's our results. And you know, as long as you disclose it as for one month, you can still represent that as your results.

Shelby Roberts: Yes. It brings up what you were talking about, the cleaning analogy at the very beginning of it was making me chuckle because really what this whole process does, even if you are just counting, it gives you an opportunity to view this over time. So, all of a sudden as an executive director, or you can look at these numbers and say, hey, we had a 30% increase from one month to another and ask your program, stop what happens? You know, did you guys advertise this? Whereas it word of mouth, what's going on? Can we replicate this and do it again? Um, and it also gives you the opportunity to talk to your board about that information - and also for budgeting.

Dolph Goldenburg: Yeah. So, let's talk about how you take a lot of data and create just a little bit of high-level data to share with your board and/or funders.

Shelby Roberts: Yeah. So this is where the strategic plan comes in. You know, if you have a backbone to go back to, it helps you identify what is important. If you don't have that backbone to go back to, I would suggest thinking about, you know, if you're not quite ready for the strategic plan or don't have the strategic plan, think to yourself, okay, let's look at our mission. Let's look at what these data points are. What are the most important things that we want to communicate? And those are the things, maybe one or two data points for each program you may want to focus. If all you have to focus on right now is numbers. You may just want to focus on people served across all your programs and start looking at that. Just start somewhere and do it consistently, and you'll be amazed at the types of trends you can start to see the questions you'll get from your board or from your executive director if you start to present this information that were, you know, things you hadn't thought of or things they had never thought of before.

Dolph Goldenburg: And, and so once you've got that backbone and you've got, you know, a few key pieces of data you want to be presenting to your board or to funders, what are some of the most effective ways to actually present it so that people understand and digest it?

Shelby Roberts: I use a lot of tables, and you can definitely use figures, but I feel like whenever you are breaking things down, especially let's just take a grant for example, you know, a grant application is generally going to ask you, what is your implementation plan? How do you intend to do this, and how will you measure it? So, what I usually do is make a table of here are the things that we're going to do step by step. And in each step, in another column of the table, I list the outputs that you will measure and then lastly, the outcomes that you'll be able to start to glean from that. And it's always important to, you know, give yourself some time for the outcomes. Right? So, that's why it's great to put those outputs that you're starting to measure first because you may not be able to get to an outcome. You know, if you're not doing a survey until a year later, you're not going to start to see outcomes for a while. But you're at least telling that funder, hey, you know, even in step one, here's what I'm measuring. Step two, here's what I'm measuring. And then that feeds in to what I said will happen, our hypothesis of what will happen by the end of this grant.

Dolph Goldenburg: And you know, I think certainly for government funders, we see that what they want is the data. And you know, often they don't want it in a format that's pretty or easily digestible. But I do think with boards and also with major donors, it's really that as nonprofit professionals, we figure out how to both interpret and translate this data into ways that people who don't even love numbers can really understand. And one of the tools that I've used a good little bit, our infographics. We live in this really miraculous day and age where a cheap online platform like Venngage or something like that. So, 15, 20 bucks a month, and you could make all the infographics who on, okay.

Shelby Roberts: Yeah. People love infographics. And I'll even go a step back from an infographic for specifically for a like a scorecard kind of thing that you're looking at. So, infographic, I think wonderful. It's a handout to funders - even to get to the board or something like that. But if you're really just measuring progress, the most successful thing that I have found is the red light, green light, yellow light. So, people see the number, they kind of get the number I've told them what the targets are, you're below target, but if you put on their green, yellow, red, they immediately email you back and say, "Wait, why am I red? You What am I doing? What can I do better?"

Dolph Goldenburg: It's interesting you say that. And then I can post this in the show notes. I can post a copy of this in the show notes. I'm a huge fan of giving boards. A really simple one page dashboard that is green, yellow, red, you know it typically, depending on your organization has four to six sections in it and each one of those sections only has three to five data points that are important for that section. So, for example, there's one on finance. There's one on programs. There's one on fundraising. If you own or operate your own building, there's probably 100 facilities. But really so the board can see it at a glance, okay, how are we doing? And then the board can elevate it's conversations to a higher level of, you know, we don't focus a lot on the Greens on just that reporting out here. The numbers we've done, but we focus on how do we turn yellows to green and reds to yellow.

Shelby Roberts: My advice on that would be as the executive director or executive committee, whoever is setting up that process, set your standards. It's easy to say like, "Oh, I think that's green. I think that's yellow." But if you set a document at the beginning that says what is green, red and yellow, you can't budge it when it comes time for the program and say, "Well I know it's red, but we had been doing better, and it's almost yellow. So, I'm going to market yellow this month." No, you just go with exactly what's on the sheet that you said at the beginning.

Dolph Goldenburg: And I think when you're saying set standards, just so we're all on the same page, I think for example, you're saying, if you're talking about programs, services, you know anything, for example, maybe between 95% and up a goal might be green. And you know, anything between, a 5% and 94% is yellow and anything below 85% might be red. And it's black and white. It's gotta be one of those three.

Shelby Roberts: Exactly. And if you don't know if that seems too daunting at the beginning, watch it for a month or two. See what the norms are. See what makes you a little scared, what makes you angry. That's what I had to do with the most recent project I'm working on. Because you know, my expectations as an evaluator are one thing. People will go out actually seeing patients in the field. You know, that's a whole other thing. Somebody doesn't feel well that day. Somebody doesn't want to take my wonderful survey that I've asked them to take. So, you know, whereas maybe I wanted the numbers to be what you said, we actually ended up with 75% to 100 was green, you know, so there's a little more leeway once you start to realize like, okay, what's the reality? And also what's the average across.

So, if you do have the counting that we talked about and you can look okay, over the last year our cashflow was x amount. We usually have this many dollars in the bank. That's how you can start to set those green, yellow reds for whenever you're, you're fulfilling out your dashboard for the board.

Dolph Goldenburg: Absolutely. And the other thing I love about green, yellow, red coding is I also think it allows us to manage expectations. And so one of the things I'll often say to, um, to boards and also to funders when I'm talking to them is it's not reasonable to expect a red to go directly to green. You know, the next stage probably for red is to get it to yellow. And most people kind of get that, you know, that

they understand that once you explain it. So then, you've actually got the time and the ability to do what's necessary to improve the red on the way to green and get it to yellow.

And people then see that as an achievement and not as, well, you're a yellow. Why are you still a yellow?

Shelby Roberts: Yeah, exactly. And you can even, you know, if you're tracking the numbers in the box along with the color too, you can show the improvement over time. Um, you know, even if you stay in red, well you went from 10% to 40%, so you made, you made progress. You know, that's something that we can see.

Whenever I build my scorecards, I usually have the current, you know, here's the current scorecard. And then depending on what the time period is, I'll either have quarters. So, you know, here's where we were last quarter, here's where we were two quarters ago, three quarters ago.

Dolph Goldenburg: And it actually gets easier after the first year because once you've done one year, then the year over years really simple, assuming you're measuring the same things and you know, your dashboard or scorecard has not changed dramatically. You literally just, you know, pull up your last year's dashboard and you're like, okay, let me plug the numbers in.

Shelby Roberts: Exactly. Yup.

Dolph Goldenburg: I would be remiss if we did not also Shelby talk about strategic planning because you are in a unique position. I think you were a board chair of a local nonprofit here in Atlanta. Do you want to say a few words about where you are board chair?

Shelby Roberts: Sure. Yeah. So, I am board chair of InTown Collaborative Ministries, which is now a midsize nonprofit and Metro Atlanta. And we used to be a small nonprofit, so talking about that growth. But our mission is to help hungry and homeless people and intown Atlanta. So, we operate a food pantry once a week and we have an outreach team that reaches out to people who are chronically homeless in Atlanta. Being chronically homeless means you've been on the street for more than one year. So, our team has had the great fortune of receiving some federal grants and some grants from the city to where we have now become the top outreach program in the city of Atlanta.

Last year, we housed 77 chronically homeless individuals.

Dolph Goldenburg: Well, first of all, you're doing important work in Atlanta, and I'm grateful for it. Second, I'm impressed. There's a lot of board chairs that could not have just gone into the depth that you went into on what your organization does. Third, now you have to talk to us about what your role has been in implementing their new strategic plan. I know you've played a key role in it, and there might be a great opportunity for board chairs that are listening to kind of get a sense of what their role might be.

Shelby Roberts: So, I played a little bit of a unique role. I wanted to go back to what I'm Kate Hayes had said on one of your previous podcasts about getting younger professionals involved in boards. So, I was brought to InTown back in 2014 because of my evaluation in public health background. They knew that they needed to start to clean up their data, get a plan around counting things. I came, and I started doing that work. We at the same time had been growing tremendously and had a strategic plan that was coming up to that last year. So, there became this conversation, we need to have a strategic plan, we

need to update our strategic plan. There are the things on the strategic plan we are not doing any more ways, that we've grown and changed.

Well, that went on for, I want to say two years. So, then all of a sudden we had a two year out of date strategic plan. It was always on the priority list, but as with small nonprofits, you know, things are always coming up. Somebody's interested in a project. You find a new grant. And so, and you know, it just kept getting pushed. Finally, we decided to put the time and the effort into it. We ended up, we spent nine months to one year going through the strategic planning process. So, I was not yet board chair whenever we started going through the process, I was on the strategic planning committee though, and we did hire a consultant. But because of my expertise, I worked directly with that consultant, and we did a lot of the work together.

It ended up being a cost savings for the organization because I was able to pick up some of the extra work. You know, he still led us and facilitated, but I did a lot of writing. Um, you know, we did collective editing and things like that together. But then, you know, once you get the strategic plan, it's such a long process and you know, everyone's so excited. So, we were at our board retreat last year, you know, this is it. We're going forward, how do we implement it? You know, so it's great that we did all of this. So, we actually ended up changing our committee structure to match their strategic plan. So, we had five goals, and we had previously had like five or six committees, which were basically the same but not necessarily the same. And so, we felt if we want it to be successful in holding ourselves accountable to the strategic plan, then we should change our committee names and structure to match what was on the strategic plan.

And then, as board chair, what I've implemented is giving everyone a committee worksheet that has the objectives of their committee's, you know, piece of the strategic plan in that. And then before every board meeting, everyone is supposed to, you know, send in the progress on each of those objectives as part of their committee report.

Dolph Goldenburg: And so, how do you tease out the work that staff are supposed to be doing versus the work that the board is supposed to be doing on that? Because I could maybe see some real gray in some bleed happening there.

Shelby Roberts: So, we're a small organization, you know. We had seven staff we are hiring this month. We're going to double our staff size. So, our board is very much a working board. So, there are those blurred lines and we are growing up to unblur those lines, and we'll put more of that data collection on the staff that was previously on the board.

The board also decided to have a staff member as part of each of the committees for those five goals areas. And so, it's a partnership where the board is more providing the accountability of making sure we're keeping up with the information and data collection, and the staff are doing the actual work of the data collection.

Dolph Goldenburg: Got It, got it. It sounds also to a great extent like your role as board chair has been a little bit of project manager for the board.

Shelby Roberts: Yes, a lot of, a lot of project management, especially as we have gone through this time of change. Whenever I was listening to what Kate was saying, it was really resonating. We have, you

know, not just me, but we also have I think for younger consultants with a lot of project management experience who have been really valuable during this strategic planning process.

One of our board members did a full day with our outreach staff where she sat down, and a lot of this information, like we were talking about earlier with the outputs, was it in their heads, a lot of it we weren't counting. So, when we went through and said, what are we counting? What do we need to count? A lot of what we needed to count wasn't there. So, she sat down for a full day and just wrote all this down with them and then went back and made the excel document that we were talking about earlier. Now, we have all these graphs, and then now have that and they can update it as they go. But just that process of getting there, it's really helpful. You can hire a consultant to do that, and you know there's people out there who are happy to do that work for you, but if you are able to have that talent on your board, that's also a really great resource.

Dolph Goldenburg: Absolutely. And so, one of the other things, one of the pro tips I think you're kind of giving to our listeners is just like you want a lawyer and a couple accountants on your board, you probably want a couple of project managers, too, cause they know how to get stuff done, and they know how to track stuff so everyone else gets stuff done.

Shelby Roberts: Yeah, exactly. Project managers. And then if you have any kind of like subject matter experts. So, if you are a public health type organization and you have somebody with that type of that type of degree or background, that's always helpful too.

Dolph Goldenburg: Well so Shelby, I would be remiss if I did not save time to ask. You the Off-the-Map question, and I've got a good one but an easy one. I think it's going to help listeners get to know you just a little bit better. I think listeners know we, we don't do this live, we record, and we're recording on Friday, March 15th, The Ides of March. And you know, you and I both live in Atlanta, so I'm just wondering what you're doing this weekend cause maybe I want to do it as well.

Shelby Roberts: I am running the Atlanta marathon this weekend, so I don't know if you're going to join me on that one. But yeah, I have a very, very big weekend coming up.

Dolph Goldenburg: You definitely have a big weekend coming up. And is that on Saturday or Sunday?

Shelby Roberts: It's on Sunday. On Saint Patrick's Day.

Dolph Goldenburg: Is this your first marathon?

Shelby Roberts: Yes, this is my first marathon. I started running when my second child was a year old, and I wanted to kind of get back some time for myself. And so, it has slowly evolved from, you know, running down the street to two years later I'm gonna try to run a marathon.

Dolph Goldenburg: That's awesome.

So, I have to share with you and I travel a lot, and I kind of view running as my time alone when I'm traveling too. Cause like, you know, you don't need any equipment. All you need is a good pair of shoes, pair of shorts and a shirt, and you can go running. I will share with you that I am not so much a marathon distance kind of a guy. I'm more of a 10k kind of a guy.

Shelby Roberts: Yeah. I think that's where I am too. You know, I did a half and, and felt good, but this, the marathon husband, totally different. You know, after doing the half I thought, oh I can do this. But it was a lot of miles.

Dolph Goldenburg: Yeah. It's a lot of miles and it's a lot of training.

Shelby Roberts: Yeah, the training has been a huge time commitment. So my, my family is very excited for the race to be here. So, I can be back on Saturdays where I have been off running for hours.

Dolph Goldenburg: So, when I was on Sabbatical in 2014, my husband decided to do a full iron man. He did not ahead of time have the conversation with me about okay doff you're going to have to pick up stuff in the house, you know, additional chores in the house because every Saturday and every Sunday I'm going to be running biking and swimming

Shelby Roberts: For hours and hours.

Dolph Goldenburg: Yeah. Especially toward the end when he was doing bricks. And so, you know, seems like, "Okay, I'm going for a 70-mile bike ride and then a 10 mile run." And pretty much that means you leave at seven o'clock in the morning and you know, you get home at like three o'clock in the afternoon and your wiped. You don't want to do anything. So, toward the end of that I said to him, you know, "You did not tell me that I was going to have to, you know, really pick up the slack of what you're not able to do around the house. I'm happy to have been able to do this because I'm on sabbatical this year. But if you want to do one of these again, you can do olympic distance. You can even do half irons. If you want to do a full iron again, you need to go to your employer and tell them you'll be working part-time."

Shelby Roberts: It is true. You know, I work from home so it's easy for me to drop the kids off at school and then go to the gym. But I've thought that a lot too. I was like, I wasn't working for hot from home right now. This would be impossible to do.

Dolph Goldenburg: Yeah. Oh absolutely. Well, well Shelby, good luck on the marathon this weekend.

Shelby Roberts: Thank you. Thank you.

Dolph Goldenburg: I know you're going to kill it, and I hope you placed in your age group.

Shelby Roberts: I Dunno about that. I'm just opening to

Dolph Goldenburg: that's fine. No pressure. No pressure. Really. I swear.

Shelby, I am so glad that you were able to take the time to talk with me today. You have given our listeners some incredible ideas about how to squeeze the most out of their data collection, whether it's just starting by counting what you do or time for you to transition and really start counting your outcomes and tracking your outcomes. And then I also appreciate you sharing how your organization that you're board chair of has really worked on implementing their strategic plan. I think so often organizations have a strategic plan but don't really figure out the implementation piece well, and I'm thrilled that you have and then you shared that with our listeners. Thank you.

Before I let you go, I've got to make sure listeners know how they can find you. They can find you on LinkedIn, and we're going to put a link to your LinkedIn profile in our show notes at www.successfulnonprofits.com, and I think you and I have chatted and that is the single best way for listeners to reach out to you is on LinkedIn.

Shelby Roberts: Yeah, that's great. And if you, if you want, we can also put a link to InTown Collaborative Ministries, organization of people are listening in Atlanta and entrusted how they can get involved.

Dolph Goldenburg: You are a great board member and a good board chair. I'm impressed, and thank you for throwing that in. I will make sure we get that in the show notes as well. Um, Kudos to you. Thank you. Thanks.

If you recall at the start of the show, I mentioned that we have a very special offer around strategic planning. This spring Successful Nonprofits™ is launching its first strategic planning facilitator cohort group. And in this group, participants will learn and apply the proven strategic planning process that we have used with clients both big and small. What you've got to do though is you've got to have a leadership volunteer who has the time and the ability to participate in this group. And also, of course, the willingness then to facilitate strategic planning at your organization. And let me share with you that this is without a doubt a *learning* group but also a *doing* group.

Not only will your key volunteer learn about our strategic planning process, they will apply what they learn. One week they learn something, and then over the next two weeks, they implement it, whether that's putting together the workgroup or working on your environmental scan or preparing for the board retreat. Step by step, they will learn what they need to do, and then they implement. Now, because we only want organizations that we believe are going to succeed in this process, organizations do have to apply in order to be considered. And so, what we will need to do is have a conversation about the key volunteer that you've recruited. And then I'll, of course, also want to have a conversation with that volunteer, really to make sure they've got the bandwidth and, again, the skills that are necessary. So, if you are interested, you can find out more at www.successfulnonprofits.com. Just check under services and then facilitator cohort group. Thanks so much. That is our show for this week. I hope you have gained some insight to help your nonprofit thrive in a competitive environment.