

BEST PRACTICES

TACL

TACL - May Special e-Newsletter

In these unprecedented days when each of us are rethinking crisis management, program funding, program development, recruitment and staying connected, TACL wants to provide creative ideas, solutions and resources to leadership programs across the state. One goal of our 2020 Strategic Plan is to develop a "Tool Box" for our members. We hope the following will provide a sample of the resources and solutions you need in real time, with more to come.

RECRUITMENT AND FUNDRAISING



RETHINKING RECRUITMENT *Cindy Schueman, Executive Director, IMPACT Leadership, Cookeville*

A question that leadership programs have struggled with during these unprecedented times is how to maintain program content when our traditional experience has been hands on, face-to-face, group collaboration, and in-the-field involvement. Clearly, technology exists for multiple video and voice options that allow for one-on-one consultation and workshops with many participants, through Zoom, YouTube, Skype for Business, etc. These apps provide the interactive exchange of knowledge and information. The larger opportunity in our communi-

ties, however, is in recruitment. In the current social-distancing environment there isn't the same ability to promote a program with a corporate lunch and learn, or a community involvement event. Many companies have laid off or temporarily furloughed employees, or shifted personnel to work from home, or split work schedules so that there are fewer employees per shift. How can leadership programs reach and influence marginalized employees to promote the optimal benefits of leadership training during their new normal?

No one can say how long the safety precautions against the current pandemic will last. Many are predicting, however, that we may be seeing a fundamental shift in the way companies and businesses do business. Leadership training and recruitment will need to evolve with current trends as well.

FOCUSING ON OTHERS

We, the Executive Committee of IMPACT Leadership, are reviewing how we can now initiate individual recruitment among the many employees whose schedules have

become more flexible. Previously, some of these potential candidates did not have work schedules that easily permitted them to attend a leadership session, missing one day of work each month. In this effort to be of service to future participants, we can demonstrate and model how they can showcase their leadership strengths. We can do this by providing information and suggestions that will help them feel connected to other professionals in their field and in control of their success or uncertain futures. By targeting individuals who are now more accessible, we can build engagement with a group of people who have not been responsive to leadership programs in the past or didn't have room in their schedules. With mutual interest, trust, and candor we can explore shaping the new dynamics of connecting citizens and collaborate on effective problem solving in re-

sponse to the new business climate.

TAKING THE INITIATIVE

Working from home or being unemployed allows potential participants to reinvest time that was otherwise occupied with commuting, attending mandatory company training events, or going to after-hours company or social functions. With this new way of working or being in the uncomfortable position of having lost a job, participation in a leadership program, during this time, would be a positive decision. It's a statement and a move to action, to not fade into mediocrity or complacency. Leadership programs can encourage participants to become proactive and take confident steps for affecting positive change in their career trajectory, and provide personal branding for future prospects. This is a prime time for potential recruits to make good use of their time. A leadership program can provide a fresh

perspective during these changing business conditions.

It is important to take the initiative and set the right tone toward the changes surrounding all of us. This opens the door for many new recruitment avenues to enroll candidates with more flexible schedules. This is the perfect opportunity for prospective recruits to put a demand on their own self-investment, development of personal career goals, and broader community involvement. Having a routine that includes self-awareness, increased leadership skills, new networking occasions, and opportunities in community growth makes each day intentional, productive, meaningful, and focused. A well-lived life when business and social norms are changing is not accidental. Leadership training for these unprecedented days is more needed than ever.

RECRUITMENT FOR THE CLASS OF 2021 Mary Poole, Executive Assistant, Leadership Middle TN



All Community Leadership Programs have had to adjust to working at home and social distancing during the COVID-19 pandemic. Maybe you planned for the "what if" scenario of a pandemic but I think most of us are asking, "What now?"

The timing of the pandemic hit when most of our programs are recruiting. This should be the time when we are sorting through applications and getting ready for our selection committees to meet.

Not the case. So, what to do?

Applications are not coming in like they used to. You are not sure what your program is going to look like. You may not have a Class of 2021. Here are a few things you need to consider:

1. PLANNING:

Do you have a Plan B? You need one. You need a Plan B, Plan C and maybe even a Plan D. We are all different. However, planning for the unknown is difficult. You can plan for best case, most likely and

worst case. Just make sure you have flexibility.

Talk to area CLP's around you and see what they are planning for 2020-2021. You may be surprised that you have resources to help you right where you are.

2. TECHNOLOGY:

Do you have the technical resources in place to host an event via Zoom, Webex, Facebook Live, etc? Get those in place! The Grand Ole Opry has not missed a show. It looks different but the show is

going on. They have adapted to the technology that is available. They have more people watching the Opry than ever before. Learn from your community and tap into technology.

3. RECRUITING/APPLICATIONS:

Have an on-line recruitment event if you are lacking in applications. Maybe you want to have half the size of a class that you normally do to accommodate “social distancing”. Whether you are making changes or not, you need applications. Host an event with a dynamic speaker and make sure that you have alumni

attend the event. Get the same buy in that you normally would. That has not changed.

Leadership Middle Tennessee, a ten county regional CLP, is taking advantage of technology and hosting a virtual recruitment event for the three counties that had events cancelled due to the COVID-19 pandemic. We have had great response for attendance. Actually, more alumni are able to attend via a virtual meeting. We are also taking advantage of having the alumni and recruits attention and promoting The Big Payback and a re-

lated lunch and learn. It’s all about a new way to communicate and we are embracing it!

It is amazing how moving forward in a positive manner will attract new recruits and inspire alumni. Do not be afraid of the unknown. Embrace that you may have to make changes on how you have always done things. Changes based on your community, state or federal government may give you different guidance than other CLP’s but one thing is the same. We need strong leaders more than ever. Recruit the best for the best is yet to come.

POST COVID 19 FUNDRAISING 101

Judy Renshaw, Executive Director, TACL (Information from “Fundraising” ALP Webinar)



TAKE THIS TIME TO START PLANNING AND RETOOLING FUNDRAISING

1) Avoid wholesale cancellations of campaigns and special initiatives – Instead, focus on cultivation, briefings, and stewardship.

- A. Every donor is an individual with a unique circumstance.
- B. 95% of fundraising is not “the ask” – what can you do to be prepared to ask when the timing is right?
- C. A temporary pause may be the best option for your organization, but that doesn’t mean you should pause all campaign activity.

- 3) Plan for future fundraising:
 - A. Strengthen case documents, proposals, and briefing/solicitation memos.
 - B. Invest time in developing engaging materials.
 - C. Draft and update language that reflects how your mission meets this moment.
- 4) Engage Your Leaders:
 - A. Engage your board and stakeholders and community leaders in the planning process.
 - B. Continue personalized outreach to top donors and volunteer leaders.
 - C. Identify new leaders and advocates.
- 5) Prioritize Your Donor Potential:
 - A. Revisit prospect research: update donor profiles with current information.
 - B. Take a second look at prospects and develop outreach strategies.
 - C. Evaluate your data entry policies and ensure data information is up to date.
- 6) Plan and Adjust:
 - A. Update and reforecast your quarterly or fiscal year budget.
 - B. Develop alternative appeal strategies and virtual events to unite your community.
 - C. Create a communications calendar to keep community connected.
 - D. Consider establishing a “rainy day fund” for future unanticipated crisis.
- 7) Establish a Short-term Outreach Plan
 - A. Sample on TACL website, leadershiptennessee.com.

Remember, the key thing is to move forward with empathy. Our donors, businesses, industries are all hurting. Be proactive in reaching out to each donor individually. During the conversation, let them share their story and you will probably have an opportunity to share your story/needs.

EXPLORING NEW IDEAS FOR FUNDING Judy Renshaw, Executive Director, TACL

- 1) Engage donors virtually with testimonials by class members and/or the Mayor on how your leadership program has impacted them personally, the community.
- 2) Consider an on-line Auction to raise funds
- 3) Engage alumni to have a birthday party on-line and list your leadership program as the benefactor.
- 4) Create a friendly competition campaign between those “claiming to be the best class” and that has the most class pride to see who can raise the most funds.

- 5) Start a grassroots campaign of individuals to raise funds for a specific part of your leadership program.
- 6) Email your data base of alumni to gather names for a "thank you" to community leaders for their handling of this crisis. Share a link where they can sign their name to the petition. After you gather all the names, share the list in a thank you card to your community leaders. Great way to keep your leadership program in front of the community.

TACL GRANT *Judy Renshaw, Executive Director, TACL*

A number of years ago, TACL refocused their goals to provide direct resources for leadership programs in the state. One of those resources was a 1:2 match grant for up to \$500 for an expense that enhances your leadership program. Simply put, you invest an amount and TACL will double that amount: example you pay \$250 and TACL puts in \$500 toward that expense, giving you a total of \$750 to use toward a speaker, brochures, transportation costs, etc. We have one grant available per each grand division (East, Middle, West) of the state. Instructions and Application are both located on our website, leadershiptennessee.com, under "Resources."

RETHINKING SPONSORSHIPS *Judy Renshaw, Executive Director, TACL*

Sponsorships have always been a standard way to help fund leadership programs. Now we just need to rethink what we offer. Scale down your expenses and find a sponsor that wants to continue to support your program but can't at the level they have in the past. Examples: lunch sponsor, snack sponsor, notebook sponsor, day sponsor, you get the idea. Break-down your expenses into more affordable amounts. You may also gain some sponsors that would like to be a part of the program, but have not been able to afford it in the past. Take time to list your expenses and develop a "new opportunities" sponsorship program.

EXPLORING A NEW RESOURCE-SBA-PAYROLL PROTECTION PROGRAM

Jack Matthis, CPA, and TACL Board Member



The Coronavirus Aid, Relief and Economic Security (CARES) Act was enacted March 27, 2020, and provides an unprecedented level of national emergency assistance for individuals, families and businesses impacted by the Coronavirus pandemic. The Act provides for a Paycheck Protection Program (PPP) that will be administered by the Small Business Administration (SBA) and provides

up to \$349 billion in loans to eligible borrowers with the express intention of motivating employers to retain and re-hire employees. Effective April 27, 2020, The House and Senate approved the funding of an additional \$310 billion for PPP loans, with an additional \$60 billion in funding for the SBA's Economic Injury Disaster Loan program.

THE LOAN PROGRAM

Among the economic relief provisions of the CARES Act, the Paycheck Protection Loan Program establishes a loan regime that allows qualifying businesses negatively impacted by the Coronavirus pandemic to obtain loans through the SBA to fund a variety of qualified costs including:

- Payroll costs
- Continuation of health care benefits
- Employee salaries and commissions for U.S. based employees (up to \$100,000 per person)
- Mortgage interest obligations (but not loan principal)
- Rent
- Utilities
- Interest on any other debt obligations incurred before the covered period

Qualifying businesses can apply through banks that are already authorized to make loans under the SBA's existing 7(a) loan program. The SBA and the Secretary of the Treasury will also extend eligibility to additional qualified lend-

ers that do not currently participate in such program. Repayment of a Paycheck Protection loan may be fully or partially guaranteed by the SBA. Neither the SBA nor any participating lenders will charge fees to the borrowers.

ELIGIBILITY

Borrowers with 500 or fewer employees (or a greater number based on the size standard applicable to the industry) may be eligible:

- For-profit businesses of all types, including self-employed individuals, independent contractors and sole proprietorships
- Nonprofit organizations exempt under Section 501(c)(3)
- Veterans organizations
- Tribal businesses

The Act contains exceptions to standard SBA rules that relax eligibility restrictions for certain covered entities such as businesses in the accommodation

and food service industry (NAICS 72) that have less than 500 employees per physical location. Other exceptions include franchises assigned a franchise identifier code and businesses licensed under Section 301 of the Small Business Investment Act.

LOAN AMOUNT & TERMS

The maximum loan amount permitted for an eligible borrower is equal to the lesser of 2.5 times the average monthly payroll costs incurred in the one-year period before the loan is made (except for seasonal employers and employers not in business between February 15, 2019 and July 30, 2019), or \$10,000,000. Loans are available for an amortizing term of up to 2 years at 0.5 percent interest. The SBA will direct lenders to defer payment of both principal and interest for a minimum of 6 months and up to a maximum of 12 months. Borrowers will not be required to pledge any collat-

eral or provide personal guarantees to secure the loans.

LOAN FORGIVENESS

Borrowers will be eligible for loan forgiveness equal to the amount spent by the borrower during an 8-week period following the loan disbursement actually spent on rent, payroll and benefit costs, utilities and mortgage interest. The loan forgiveness amount is subject to reduction if the borrower terminates employees or reduces employee salaries and wages during the 8-week forgiveness period. Reductions in workforce, salaries and wages that occur from February 15, 2020 to April 26, 2020 will be disregarded for purposes of reducing the forgiveness amount so long as the reductions are eliminated by June 30, 2020. Borrowers who satisfy the requirements for loan forgiveness will be able to exclude the forgiveness amount from taxable income.



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- and -
COME TOGETHER

TACL 2020 - OCTOBER 14-16
HOSTED IN SUMNER COUNTY BY






http://tinyurl.com/TACL20ComeTogether

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We only covered a few topics in our newsletter, come to the TACL Conference and learn from your peers about many topics impacting your program. Conference Scholarships are available for TACL members.

Check Us Out Online at <https://leadershiptennessee.com/tacl>