



Effective Boards: What Does a Treasurer Do?

February 27, 2024
9 a.m. – 12 p.m.
Geekdom Event Centre

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Governance vs. Management

Common Challenges

- Managing Cash Flow with Internal Controls
- Restricted and Unrestricted Funds
- Borrowing for Operations/Lines of Credit
- Mission Creep

Effective Boards Series 2024 Description



Program Agenda: What Does a Treasurer Do?

Introductions: Trainers, Sponsors, Attendees—Leilah Powell

Meeting Your Non-profit Mission and Providing Accountability—Leslie Palmer

Governance vs. Management and Board Development—Leslie Palmer

- Clarity on role
- Transparency on time commitment
- Recruiting individuals with existing skills
- Supporting board members
- Importance of committee structure (Finance Committee)

Fiduciary Responsibility—Chris Carmona

- Liability
- Insurance, including D&O
- Fiscal Oversight

What skills do Treasurers need and when do they apply them?—Chris Carmona

- Bookkeeping
- Compliance
- Audit

Building Board and Treasurer Confidence—Chris Carmona

- Reviewing statements and audits
- Asking questions (internal and external)
- Understanding how financial strategies support mission

Break (15 minutes)

Common Challenges—La Juana Chambers Lawson

- Managing cashflow
- Restricted and unrestricted funds
- Borrowing for operations/lines of credit
- Mission creep—does funding align with program goals

How can Treasurers acquire and develop their skills?—Chris Carmona

- Utilize accounting and audit professionals expertise
- Identify and utilize trainings
- Peer support

Alternative Models—Merced Housing Texas

Q&A—All Speakers

Speaker Biographies

M. Leslie Palmer

Managing Consultant | Founding Principal

M. Leslie Palmer Consulting Group

After decades of for-profit and nonprofit experience, Leslie decided to strike out on her own, intending to share her expertise with the community, partner with other strong practitioners, and help grow the capacity and success of the nonprofit community in San Antonio and beyond. Previously, Leslie served as the Executive Director of the World Affairs Council of San Antonio, Vice President and Executive Director for City Year San Antonio, and Assistant Vice President of Development for the American National Red Cross to name a few.

Professionally, Leslie has had significant experiences in Board & Leadership Development, Capacity Building, Change Management, Community Collaboration, Fundraising, Marketing & Communications, and Strategic Planning. She has served on numerous boards and is presently Chair of City of San Antonio, Commission on Strengthening Family Well-Being; Vice Chair of Social Venture Partners San Antonio Board of Directors; and Immediate Past Chair of Students of Service – San Antonio, Board of Directors.

Originally from Newport, RI, she has lived in San Antonio, TX for more than 20 years. Leslie is a graduate of Villanova University in Villanova, PA. She has 3 wonderful adult children, a terrific daughter-in-law, two delightful grandsons and a rescued dog.

Fun Fact: Leslie was the first female professional fire fighter in the county and city of Newport, RI.

Christopher M. Carmona, CPA

Co-Founding Partner | Schriver, Carmona & Company

Christopher (Chris) M. Carmona, CPA, is a co-founding partner of Schriver, Carmona & Company and has over twenty-one years of public accounting experience. Chris received his BBA in Accounting from the University of Texas at San Antonio and is a member of the American Institute of CPAs and the Texas Society of CPAs.

He currently serves on the San Antonio regional board of KIPP Texas Public Schools, on the board of Eva's Heroes, on the board of The San Antonio Medical Foundation, and on the founding board of governors of the Centre Club (formerly the Plaza Club). Chris is a member of Leadership San Antonio Class 46, C12 Group: Leon Springs CEO Peer Advisory Board, and Social Venture Partners of San Antonio. Chris previously served as Treasurer for The Nonprofit Council and chaired the finance council of his parish, St. Matthew Catholic Church. At St. Matthew, he also chaired the Annual Archbishop's Appeal and served as the parish's chair for the Archdiocesan Capital Campaign.

Chris has been married to Ana for almost 20 years and they have three children: Sophia, Daniel and Michael.

La Juana Chambers Lawson**Founder & CEO | Tacit Growth Strategies**

La Juana "The PMO CEO" Chambers Lawson is the Founder and CEO at Tacit Growth Strategies, a leading project management office (PMO) that manages a diverse portfolio of public and private sector entity projects and programs. Tacit Growth Strategies specializes in charitable fundraising (grant writing and administration), nonprofit management and government contracting.

La Juana is a Commercial Realtor with Phyllis Browning Company who proudly serves as a buyer and tenant agent for local professional service businesses and nonprofits with great diligence, respect and sustainability. She has been featured in O, The Oprah Magazine, Entrepreneur, Forbes, Marquis Who's Who in America (Texas Business Owners), is a San Antonio Business Journal 40 Under 40 Honoree (2022), a Finalist for the National Association of Women Business Owners San Antonio Chapter's Women Business Owner Awards (2023), and a 2024 Inductee of the distinguished San Antonio Women's Hall of Fame. She is an international best-selling author of *Master Grant Writing: A Project Manager's Guide*.

La Juana serves as Director-General of the Global Alliance for Angel Investor and Venture Capital Networks by the esteemed Global Council for the Promotion of International Trade, Vice President (Outreach) and Chapter Social Impact Volunteer Leader of the Alamo Project Management Institute (PMI), Board President of the Bexar County/City of San Antonio U.S. Department of Housing and Urban Development Continuum of Care TX-500 Close to Home, formerly known as South Alamo Regional Alliance for the Homeless (SARAH), Vice President of the Fair Contracting Coalition, Community Advisory Board Member of the River City Federal Credit Union, Board Director and Procurement Chair of the African American Chamber of Commerce of San Antonio, and Mayor Ron Nirenberg's appointee to the City of San Antonio's Small Business Economic Development Advocacy (SBEDA) Committee.

Kristin Davila**President & Executive Director | Merced Housing Texas**

Kristin received her Bachelor's degree in Sociology and Women's Studies from the University of Michigan-Ann Arbor. She completed the San Antonio Area Foundation and Our Lady of the Lake University's certification in nonprofit leadership and management and was a member of the inaugural cohort of the Holt Leadership Fellows Program. Most recently, she completed NeighborWorks America's Achieving Excellence Program where she earned an Executive Education certificate from Harvard University's Kennedy School of Government.

Kristin currently serves on the San Antonio Area Foundation's SALSA (Successfully Aging and Living in San Antonio) Housing Workgroup and is a member of the SALSA Steering Committee. She also serves on the City of San Antonio's Strategic Housing Implementation Plan Steering Committee as co-chair of the Affordable Housing Community Stakeholder Forum.

Kirklan W. King

Executive Director | Affinius Capital
Board Chair | Merced Housing Texas

Kirk King is an Executive Director with Affinius Capital (formerly known as USAA Real Estate), where he oversees the due diligence and other aspects of the company's investment in industrial development projects throughout the US and Mexico. He holds a master's degree in Land Economics and Real Estate as well as a bachelor's degree in Environment Design (Architecture) from Texas A&M University.

Prior to joining Affinius Capital in 2007, Kirk served as Vice President with the Brooks Development Authority, with responsibility for the development, leasing, and other real estate investment decisions for Brooks City-Base. Other professional experience includes real estate consultation and appraisal, multi-family property ownership, and retail and office development and management.

Kirk joined Merced Housing Texas' Finance Committee in 2011 and their Board of Directors in 2016.

Leilah Powell

Executive Director | LISC San Antonio

Leilah Powell is the Executive Director of the San Antonio office of LISC, a national nonprofit and Community Development Financial Institution. LISC San Antonio's mission is to work in community to build wealth, health, and power for excluded and disinvested populations by expanding capacity and leading systems change.

A native San Antonian, Leilah has worked in many areas of the community development sector in San Antonio—for financial institutions such as Bank of America; non-profit organizations such as the San Antonio Housing Trust and the Brackenridge Park Conservancy; as a consultant for clients including the San Antonio River Authority, Bexar County, and Trinity University; and for municipal and county government, including as Chief of Policy for two mayors.

Leilah has served on numerous boards, including the American Institute of Architects (AIA) San Antonio, the San Antonio Section of the Texas Chapter of the American Planning Association, and her neighborhood association. She recently completed her term as President of the Board of Close to Home (previously South Alamo Regional Alliance for the Homeless or SARA), and she currently serves as a Commissioner for Opportunity Home.

She holds a master's degree in Community and Regional Planning from the University of Texas School of Architecture and a bachelor's degree from Stanford University.

Governance v. Management: What's the Difference?

Boards should govern, not manage. The difference is often misunderstood and the impact of such confusion can adversely impact the institution. Frequently, one can tell whether a Board is governing by the questions that are asked by trustees. Boards who are managing will focus on small details, departmental processes, and/or individual outcomes. Boards who govern are concerned with organizational health, enterprise structure, strategic relevance and direction, and institutional results. The distinctions could be described as a matter of scale. Below are sample questions asked by trustees which can indicate whether the Board's focus is appropriately scaled.

Management	Governance
<p>What do we pay our teachers?</p> <p>Who got a raise this year?</p> <p>Will you hire my brother-in-law?</p>	<p>Do we have a compensation philosophy and how is its effectiveness measured?</p> <p>How does our employee turnover rate compare to other colleges? ...to previous years?</p> <p>Are we considered a good place to work? How do we know?</p>
<p>How many gallons of gas do we use in our police cars?</p> <p>What is our kilowatt/hour rate?</p> <p>Do we have low-flush toilets?</p>	<p>Tell me about our energy management policies? How do we know that they result in a prudent use of energy?</p> <p>What challenges should we address that prevent us from employing useful conservation methods?</p> <p>When is the next time we refresh our campus master plan and should we consider "green" standards?</p>
<p>What is enrollment in "Program X" this semester?</p> <p>How many recruiters do we have?</p> <p>How many dual-credit classes did we teach?</p>	<p>What are our growth markets in the future and how will we sell into those segments?</p> <p>Are you happy with our product mix? Why?</p> <p>How do we assess the viability of our programs? What role does dual credit play in program growth and marketing?</p> <p>How does our multiyear growth rate compare to the statewide rates and to the growth in our local high school graduation classes?</p>

Why is the grass so tall?	How do we prioritize our capital?
Can we please paint the boardroom?	Are there functions we should consider outsourcing? Why?
How much will we raise our tuition rates?	How does our revenue mix compare to our peer institutions? What is our long-term dependence on tuition and what are the alternatives we could consider? What is the students' sensitivity to tuition increases? To debt levels? How do we know?
Why didn't we name Smith as our starting pitcher last night?	How do graduation and placement rates of our student-athletes compare with the rest of the student body? Why?
What's the theme of the Awards Banquet this year?	What could the Board do to improve the level of donations made to the college?
What's the gross margin of the bookstore?	Why do we operate these various auxiliary functions? What are the fiscal and non-fiscal benefits and costs? Are there alternatives?
When can we start an Analyzer program?	What are the major strategies contained in our academic plan and how is our progress to plan?
My wife is into Yoga, could you please start a CE course in that?	How is our academic plan enabled or constrained by our facilities? By our staffing levels? By our campus size?
What good is a course in basket weaving?	How do we assess whether our programs are relevant to the career aspirations of our students? How often do we measure that?

**Boards govern, managers manage,
and the CEO is the bridge between the two.**

For more information on the difference between governance and management, web-search “**Govern, not manage**” to find a broad collection of material on the topic.

TACIT GROWTH STRATEGIES

Tacit Growth Strategies **Effective Boards: Nonprofit Treasurer Training** Common Challenges

PARTICIPANT HANDOUT

Topics of discussion for presenter and trainer La Juana “LJ” Chambers Lawson, Founder & CEO at Tacit Growth Strategies, LLC:

- Managing cash flow with internal controls
- Restricted and unrestricted funds
- Borrowing for operations/lines of credit
- Mission creep - does funding align with program goals

La Juana has exceptional experiences serving on nonprofit boards as an executive consultant and board officer spanning nearly two decades across the nation and abroad (South Sudan, India, Virginia, Michigan, Mississippi, and Texas). Since founding Tacit Growth Strategies in 2018, La Juana and her team of subject matter experts have worked to build health, wealth and power through government contracting, grant and proposal writing, and commercial real estate for hundreds of nonprofit and small business leaders. At her core, La Juana is an educator. She’s one of the longest serving lecturers at two universities: the H-E-B School of Business and Administration at the University of the Incarnate Word, where she teaches Project Management and Management Information Systems and the School of Business and Leadership at Our Lady of the Lake University, where she teaches Grant Writing, Project Management, Strategic Planning, Capstone and other courses for the Master of Science in Nonprofit Management degree program.

Currently, La Juana serves as the Board President of Close to Home, formerly known as the South Alamo Regional Alliance for the Homeless, Board Vice President of the Fair Contracting Coalition, Board Vice President (Outreach) and Chapter Social Impact Volunteer Leader of the Alamo Project Management Institute, Board Officer of the African American Chamber of Commerce of San Antonio, and a Board member appointed by Mayor Nirenberg of the City of San Antonio’s Small Business Economic Development Advocacy (SBEDA) Committee. Notably, La Juana is the immediate past President/Board Chairman of the San Antonio African American Community Archive and Museum (SAAACAM).

[This handout has been created as a reference guide to fill-in throughout La Juana’s presentation.](#)

Paying close attention will ensure that this handout is completed and available to you anytime you need to refer to it after the presentation is over.

Thank you for your attention!

TOPIC #1 MANAGING CASH FLOW

Currently, what funding sources does your nonprofit organization (NPO) rely on?

- Corporate/Sponsors
- Individual Donors
- Grant Funding
- Major Gifts
- Government Funding
- Campaigns (Capital, Annual, Endowment)
- Special (Fundraising) Events

What type of fundraising event(s) does your NPO host annually, if any?

- Gala
- Luncheon
- Fashion Show
- Golf Tournament
- Arts/Gallery Exhibit
- Auction
- Other: _____.

When are your fundraising events?

Where are your fundraising events?

Who are you collaborating with for your fundraising and what is the structure of the collaboration (e.g. board volunteers, community volunteers, contractors, consultants, government entities, business partners, program sponsors, etc.)

What other question(s) come to your mind:

“By failing to prepare, you are preparing to fail.” - Benjamin Franklin

I can confidently share that less than 21% of the dates available in a calendar year - mostly due to sporting events, national holidays, weather, work-from-home (WFH) schedules and commutes, etc. are actually feasible to choose for fundraising purposes.

2024

January							February							March							April													
S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S							
1	2	3	4	5	6					1	2	3							1	2									1	2	3	4	5	6
7	8	9	10	11	12	13	4	5	6	7	8	9	10	3	4	5	6	7	8	9	7	8	9	10	11	12	13							
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28	29	30	31				25	26	27	28	29			24	25	26	27	28	29	30	28	29	30											
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May							June							July							August													
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September							October							November							December													
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29	30						27	28	29	30	31			24	25	26	27	28	29	30	29	30	31											

And fundraising shouldn't be limited to the dates that you choose to host events.

Fundraising should be regularly integrated into a NPO's work and strategy.

As an inherently complex and adaptive system, fundraising can flourish in environments that are risk tolerant, mission oriented, and that regularly re/prioritize capacity building for the organization's people - growing their skills and knowledge.

Successful fundraising activities are the intentional product of confident and well-resourced fundraisers working together in a syncopated rhythm.

Regular fundraising may involve intertwining celebrations with a charitable cause (consider silent auctions, raffles, donation drives, storytelling through photos and videos).

Fundraising should be FFC:

FUN,

FREQUENT, and

CONVENIENT. <Ask LJ what she means. This is a multitiered term used in fundraising.>

Choosing a date for your fundraising event(s) is just as important as identifying what grant or RFX to:

- Research (*thinking forward with historical information - independent research, collaborative research, hybrid*),
- Select (ask LJ about numeric vs non-numeric project selection processes),
- Invest for pursuit (readying cash in-flows, resources (human and others), strategic partnerships (in-kind/shared services/referrals), make or buy decisions, etc.)
- Perform and evaluate performance at the organizational staff levels as well as the board of directors (internal audit, insurance triggers, corrective action, TQM, etc.)

MANAGING CASH FLOW

- Think about your NPO's cash flow - what are the patterns?
- What time of the year is usually tough?

What fundraising activity(ies) or funding source(s) tend to carry your NPO through the year?

- What months do those sources of funding hit and how soon until they're released and then exhausted?
 - How much of the funds are unrestricted? Restricted?
 - What impact does this have on your NPO's operations and capacity?
-
- What types of **intentional** fundraising activities could help?
 - What other types of funding could your NPO consider?

Managing cash flow requires good PROJECT MANAGEMENT.

In "Master Grant Writing: A Project Manager's Guide", I define **Project Management** as "the art of coordinating resources and directing cross-functional teams so the components of work performed by each team produce frequent value to the customer(s) with a stake in the project" (pp. 23).

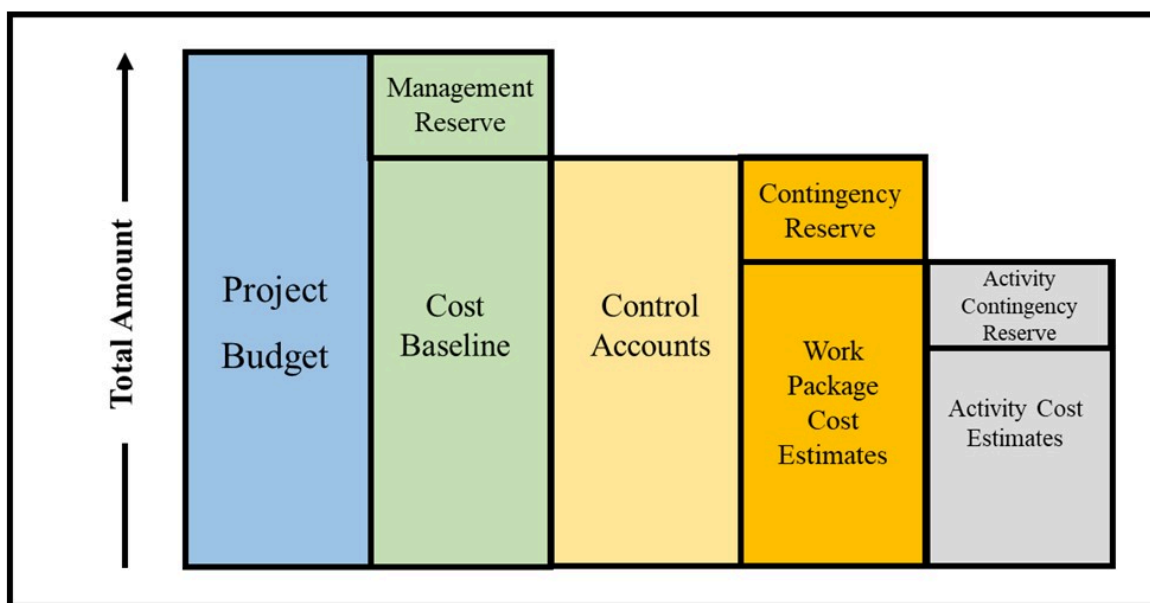


Figure 9.1: Project Budget Components. Adapted from PMBOK Guide Sixth Edition

Review Figure 9.1: Project Budget Components. Adapted from the Project Management Body of Knowledge Guide (6th Ed.).

- ❖ Annually, your NPO board of directors should have approved budget(s) and/or a cost baseline.
 - The cost baseline is an approved version of your NPO's time-phased budget and any management reserves.
 - The cost baseline is used as a basis for comparison to actuals. It monitors and measures budget performance.

- The cost baseline includes a budget contingency (i.e. management reserve). Comparatively, a project cost baseline would include activity cost estimates and a contingency budget that functions as a management reserve yet on the project level to accommodate changes (usually through formal change management/control procedures) made to activities originally planned (and authorized) on a project's work breakdown structure and/or Gantt chart per the 100% Rule.
- Managing cash flow is simplified with the integration of earned value management.

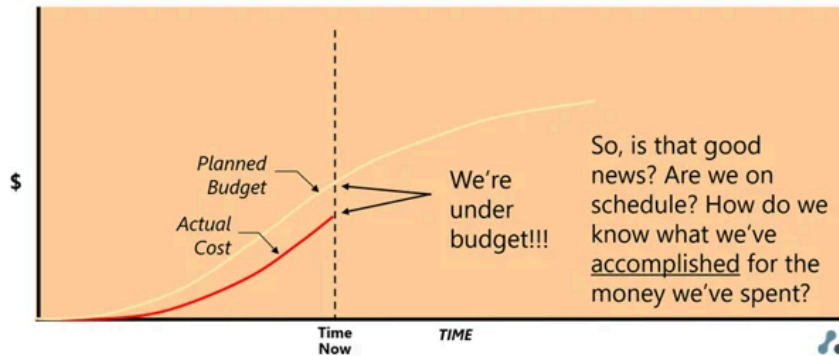


Figure 1. Typical Budget vs. Actual Comparison

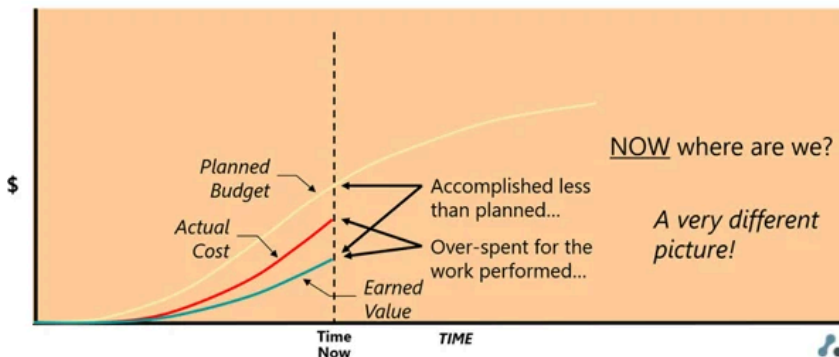


Figure 2. Earned Value Comparison

Source: Pinnacle Management, EVM (2022)

Additionally, managing cash flow is directly related to the variance associated with **cost and time approximation/estimation techniques and payments (as well as their delivery schedules - planned and actual) for income and expenses.**

Examples of budgetary line items that are commonly un/under evaluated and monitored for earned value are the following budgeted deliverables or components of work for NPOs:

1. In/Direct Labor
2. Materials
3. Equipment
4. Memberships/Subscriptions
5. Licenses/Permits

-
6. Facilities
 7. Information Technologies/Information Systems
 8. Professional Fees/Services
 9. General Administration/Overhead (Indirect Costs)
 10. Delivery (Normal or Expedited, Weight, Quantity, Method of Delivery)
 11. Program Funds/Discretionary/Emergency Funds
 12. Sponsorships
 13. In-Kind

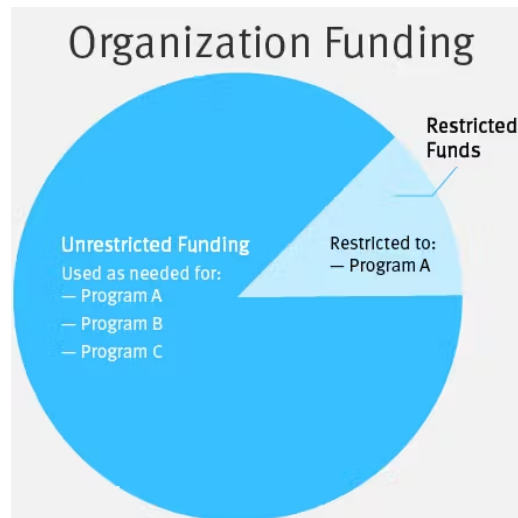
Questions to Ponder:

- What types of contracts do we have? E.g. Firm Fixed Price, Cost Reimbursable, Time and Material, etc.
 - What are the payment terms for our contracts and grant-funded programs?
 - Thinking about the schedule of payments, do the payments come consistently and as according to the contract?
 - What internal controls manage change on contracts and grant-funded programs within the organization?
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Well-run NPOs tend to make good use of one or a combination of the following tools to manage cash flow (Olenick, 1991):

1. An annual cash flow budget, for overall financial planning.
2. A month-by-month cash budget, to anticipate possible cash shortfalls during the year that won't show up in the annual cash flow budget.
3. A monthly worksheet, for scheduling payments, assigning priorities if necessary, and for making sure you'll have enough cash in the bank to cover payments.

RESTRICTED AND UNRESTRICTED FUNDS



- **Restricted** funds are earmarked for specific or limited use. They can be permanent or conditionally/temporarily restricted and are identified as an asset on a NPO Statement of Financial Position as “**With Donor Restrictions**”.
- **Unrestricted** funds can be used for overhead like expanding staff, equipment, training, professional fees/services, emergency expenses, and general operations. Identified as an asset on a NPO Statement of Financial Position as “**Without Donor Restrictions**”.

Statement of Activities			
Revenues	Unrestricted	Temporarily Restricted	Total
Individual Donations	\$150,000	\$50,000	\$200,000
Grants	\$50,000	\$100,000	\$150,000
Investment Income	\$75,000	\$0	\$75,000
Other	\$0	\$0	\$0
Total Revenues	\$275,000	\$150,000	\$425,000
Expenses			
Program Services	\$160,000	\$0	\$160,000
General and Administrative	\$37,000	\$0	\$37,000
Fundraising	\$38,000	\$0	\$38,000
Total Expenses	\$235,000	\$0	\$235,000
Change in Net Assets	\$40,000	\$150,000	\$190,000
Net Assets, Beginning of Year	\$4,300	\$0	\$4,300
Net Assets, End of Period	\$44,300	\$150,000	\$194,300

Source: Jitasa (2023)

BORROWING FOR OPERATIONS/LINES OF CREDIT

In finance, NPOs are treated a lot like small businesses.

For small businesses, a business plan, in addition to tax returns, EOY balance sheet/income statement, is likely to be requested by a banker, venture capitalist, or other investor. Preparation of a sound business plan is fundamental to receiving money needed to establish or operate a business.

Every bank has a set of rules it uses to determine under what conditions and circumstances it will lend money (Frost Borrowing Guide, 2024)

Similar to small businesses, a financial institution (i.e. bank or CDFI) may request reference letters, operating history, agendas and minutes, copies of executed contracts and paid invoices, constitution/bylaws, annual budgets and impact reports, and even the personal credit reports from the board's officers/bank signatories for nonprofit organizations (NPOs).

The newer they are with shorter credit histories, the more likely they'll be directed to exploring a line of credit or business credit card. A line of credit is a revolving loan that provides easy access to cash when the entity needs it instead of all upfront. Grant dollars may be available, depending on the clarity and direction of the NPO's mission and demographics.

Community Development Financial Institutions (CDFIs) are lenders that specialize in offering financial assistance and services to nonprofits. They are usually nonprofits themselves, and may overlap with nonprofit loan funds. Nonprofit loan funds also provide financial assistance to charities and other nonprofits.

Qualifying for funds and different loan products from a plethora of third party financing institutions (including business entities and public-private-partnership/procurement opps) requires intentional data definitions, collection, organizing, storing, analysis, stewardship, protection, integrity, and re/sharing.

Directors of NPO Boards are often audited for coherence and strength. Public perception often qualifies and disqualifies nonprofit organizations seeking to diversify their funding sources and types.

Serving on a nonprofit board of directors requires adherence to fiduciary duties.

Common fiduciary duties are:

- ★ Duty of Care
 - Board members participate fully in their role and are accountable for successes and mistakes.
- ★ Duty of Loyalty
 - Board members put the interest(s) of the NPO before any other interest(s).
- ★ Duty of Obedience
 - Board members support all board decisions once those decisions have been finalized. The board speaks with one voice.
- ★ Duty of Integrity
 - Board members are responsible for all governance documentation.
- ★ Duty of Foresight
 - Board members have a shared commitment to think strategically. The board ensures that the NPO is sustainable long after their service to the board. **“Blessed is s/he who plants trees under whose shade s/he will never sit.” - Proverb**

The San Antonio Area Foundation (2023) defines **equity** as “the lack of disparity in life outcomes among groups of people classified by identity associations such as race, gender, ethnicity, age, physical ability, sexual orientation, etc. Improving equity means promoting justice and fairness within the procedures, processes and distribution of resources by institutions and systems.” **“Equity has been achieved when who you are or where you are from no longer predicts your life outcomes.”**

According to the latest U.S. Census Bureau’s American Community Survey, poverty in San Antonio is concentrated in 17 zip codes per correlated housing, education, health and employment indicators: 78202, 78203, 78204, 78205, 78207, 78208, 78210, 78211, 78214, 78215, 78220, 78221, 78225, 78226, 78228, 78237, 78242

Is your NPO serving areas with the greatest need?

Does your NPO operate in areas with the greatest need?

“Of the city’s estimated 1.4 million residents, 18.7% — nearly 270,000 people — were below the poverty level, according to the bureau’s American Community Survey (ACS) for 2022. In 2021, about 240,000 people lived below the poverty level, about 17% of San Antonians.”

by Iris Dimmick
September 14, 2023



A woman does her grocery shopping at H-E-B with food stamps in 2021. The number of people in San Antonio receiving benefits through food stamps, increased by nearly 5% in 2022. Credit: Bris Woods / San Antonio Report

La Juana Chambers Lawson

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MISSION CREEP - DOES FUNDING ALIGN WITH PROGRAM GOALS

According to Ellen Karsh and Arlen Sue Fox (2020), successful programs and organizations are not grant driven, they are mission driven.

Plainly stated, successful programs and organizations “are not created, massaged, and manipulated to fit the precise guidelines of a grant that just happens to be available” (pp. 97).

Projects and programs should reflect organizational strategy.

The characteristics of successful *traditional* projects and *agile* projects are listed on page 27 of “Master Grant Writing: A Project Manager’s Guide”.

Review the project or program’s goal, its accompanying objectives and daily activities/tasks performed and then assess for strategic alignment and progress (or challenges to progress).

The Supplement Not Supplant Principle

Funders want to make sure that the proposed project or program will be supported by the chain of command and not just one or two individuals so that it is understood as an innovation that will be adopted as a necessary component of work for the organization’s fulfillment of its mission, vision and goal statements over an extended period of time.

Tacit Growth Strategies

Getting On Board

Common Challenges for Nonprofit Treasurers

PARTICIPANT FEEDBACK FORM

Thank you for engaging with me throughout this training event. I look forward to reading your feedback.



Thanks in advance!

Sincerely,
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1. What did you think of this training topic?
2. Would you recommend this training to a colleague or friend? (circle or underline one)
Yes or No
3. Do you feel better equipped as a result of this training? If yes, please share in what ways.
4. What else would you like to share with me about this training or otherwise?
5. What would you like to learn more about?

About Tacit Growth Strategies

Tacit Growth Strategies (TGS) is a leading management consulting firm and cutting-edge project management office (PMO) that serves both the public and commercial sectors. Our team provides expert process, results-oriented consulting services with broad capabilities in project management, information systems, nonprofit administration/leadership/management, and grant/proposal writing and management to individuals and organizations seeking financial, operational & leadership optimization and success. We help our clients address their toughest challenges and navigate minute and/or significant pressures to deliver projects efficiently, effectively, and reproducibly with the internationally-informed gold standard of Project Management.

About La Juana Chambers Lawson

FOUNDER AND CEO, TACIT GROWTH STRATEGIES

La Juana "The PMO CEO" Chambers Lawson is the Founder and CEO at Tacit Growth Strategies, a leading project management office (PMO) that manages a diverse portfolio of public and private sector entity projects and programs. Tacit Growth Strategies specializes in charitable fundraising (grant writing and administration), nonprofit management and government contracting. La Juana is a Commercial Realtor with Phyllis Browning Company who proudly serves as a buyer and tenant agent for local professional service businesses and nonprofits with great diligence, respect and sustainability. She has been featured in O, The Oprah Magazine, Entrepreneur, Forbes, Marquis Who's Who in America (Texas Business Owners), is a San Antonio Business Journal 40 Under 40 Honoree (2022), a Finalist for the National Association of Women Business Owners San Antonio Chapter's Women Business Owner Awards (2023), and a 2024 Inductee of the distinguished San Antonio Women's Hall of Fame. She is an international best-selling author of "Master Grant Writing: A Project Manager's Guide". La Juana serves as Director-General of the Global Alliance for Angel Investor and Venture Capital Networks by the esteemed Global Council for the Promotion of International Trade, Vice President (Outreach) and Chapter Social Impact Volunteer Leader of the Alamo Project Management Institute (PMI), Board President of the Bexar County/City of San Antonio U.S. Department of Housing and Urban Development Continuum of Care TX-500 Close to Home, formerly known as South Alamo Regional Alliance for the Homeless (SARAH), Vice President of the Fair Contracting Coalition, Community Advisory Board Member of the River City Federal Credit Union, Board Director and Procurement Chair of the African American Chamber of Commerce of San Antonio, and Mayor Ron Nirenberg's appointee to the City of San Antonio's Small Business Economic Development Advocacy (SBEDA) Committee.

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Effective Boards Series 2024

Upholding the Public Trust Thursday, February 15
3 - 4:30 p.m.
Zoom

What Does a Treasurer Do? Tuesday, February 27
9 a.m. - 12 p.m.
Geekdom

So, You Want to be President Tuesday, March 26
9 a.m. - 12 p.m.
Geekdom

Why Do We Need a Secretary? Tuesday, April 30
9 a.m. - 12 p.m.
Geekdom

Funders' Perspectives on Effective Boards May
Zoom

Board Member Journey Summer
In-Person

Representing Your Organization August
In-Person

Recruiting & Orienting Board Members September
Zoom

Fundraising for Board Members October
Zoom



Effective Boards provides training opportunities for local non-profit staff and board members to better understand the board of directors' roles and responsibilities and to support board function for overall healthier nonprofit organizations.

The San Antonio office of Local Initiatives Support Corporation (LISC) developed the Effective Boards series in 2023 after hearing from multiple local partners who wanted to improve their boards' operations, and from funders committed to expanding capacity in our sector.

For 2024, the series has been refined based on participant feedback and emerging needs. New this year are specific training opportunities will be offered for active or aspiring board presidents, treasurers, and secretaries to help individuals develop the knowledge and skills needed to effectively serve in these roles.

With support from PNC Bank to offset costs, LISC San Antonio has committed to offering the **Effective Boards Series** on an annual basis from 2024-2026, free of cost to participants.

The inaugural **Effective Boards Series** included seven training sessions—mostly virtual, with two in-person events—which were attended by a total of 140 participants representing about 40 unduplicated organizations. 100% of survey respondents over the course of the series expressed that the trainings provided useful information and that they would recommend the sessions to others.

This year's **Effective Boards Series** sessions are outlined above—save the dates and join us! Session descriptions can be found on the reverse page.

LISC SAN ANTONIO

Upholding the Public Trust

Thursday, February 15, 3 – 4:30 p.m.

Zoom

Review the public purpose of not-for-profit organizations to deepen understanding of organizational and board member roles and responsibilities, including regulatory, legal, and ethical obligations.

What Does a Treasurer Do?

Tuesday, February 27, 9 a.m. – 12 p.m.

Geekdom

Explore legal and practical considerations and obligations of the Board Treasurer, including fiduciary responsibilities, key skills required and how to develop these skills, and common challenges.

So, You Want to be President

Tuesday, March 26, 9 a.m. – 12 p.m.

Geekdom

Explore legal and practical considerations and obligations of the Board President, including running productive meetings, supporting board members, building a relationship with the CEO/ED.

Why Do We Need a Secretary?

Tuesday, April 30, 9 a.m. – 12 p.m.

Geekdom

Explore legal and practical considerations and obligations of the Board Secretary.

Funders' Perspectives on Effective Boards

May – Zoom

A diverse panel of funders discusses what they look for in a board before they invest, including red flag behaviors that cause them to be cautious.

Board Member Journey

Summer – In-Person

Personal reflections from board members and leaders on the pathway to creating an effective board, including practical approaches to engagement, education, and recruitment.

Representing Your Organization: Communications for Board Members

August – In-Person

Develop skills around promoting and representing your organization in a range of situations, including advocacy and fundraising, and discuss how to prepare for, respond to, and recover from negative media coverage.

Recruiting and Orienting Board Members

September – Zoom

Discussion by nonprofit leaders on how to engage board members around your organization's mission, vision, values, and goals, including approaches to board recruitment and education to lay the foundation for effective engagement.

Fundraising for Boards Members

October – Zoom

Building on skills developed in earlier sessions, board members will learn how they can work with staff to establish and maintain relationships with current and potential funders.

All sessions are available free of charge thanks to funding from PNC Bank to offset costs associated with this training series. Thanks to Geekdom as well for hosting us for the initial in-person sessions.



In the San Antonio office of Local Initiatives Support Corporation (LISC), our mission is to work in community to build wealth, health and power for people who have been systematically excluded or disadvantaged. We carry out this work by expanding local partners' capacity and advocating for and leading systems change. We believe that people are at the center of our work—we move at the speed of trust. Our ultimate goal is to support a community in which residents are empowered to achieve their aspirations for themselves, their families and their neighborhoods.

www.lisc.org/san-antonio

Get Updates on the Effective Boards Series

To make sure you hear about event updates and changes, sign up for LISC San Antonio's email newsletter. Use the QR code or link below to subscribe!



<http://tinyurl.com/lisc-sa-subscribe>