



Volunteer Lawyers Strengthening Nonprofits & Our Communities

Transitioning from a Volunteer-Only Organization to a Staffed Organization

Part 1: How do we know we are ready to hire staff?

Presenters: Sara Taylor, Staff Attorney, Pro Bono Partnership and
Roosevelt Smith, Roosevelt Smith Consulting

Tuesday, February 27: 12-1:30pm

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Disclaimer

This presentation is provided as a general informational service to clients and friends of Pro Bono Partnership. It should **not** be construed as, and does not constitute, **legal advice** on any specific matter, **nor** does this presentation create an **attorney-client relationship**. You should seek advice based on your particular circumstances from an independent legal advisor.



What is the Pro Bono Partnership?

- Pro bono legal assistance for nonprofit organizations through the services of our staff and corporate and private attorneys
- To be eligible, the organization must be:
 - Nonprofit, tax-exempt (or seeking 501(c)(3) status);
 - Primarily serving the poor and disadvantaged or enhancing the quality of life in neighborhoods in CT, NJ, and NY;
 - Focusing on health and human services, community development, affordable housing, neighborhood revitalization, environmental protection, and the arts; and
 - Unable to pay for legal services without significant impairment of program resources.
- More information at www.probonopartner.org
- Please sign up for our email updates and check out our upcoming webinars and workshops!

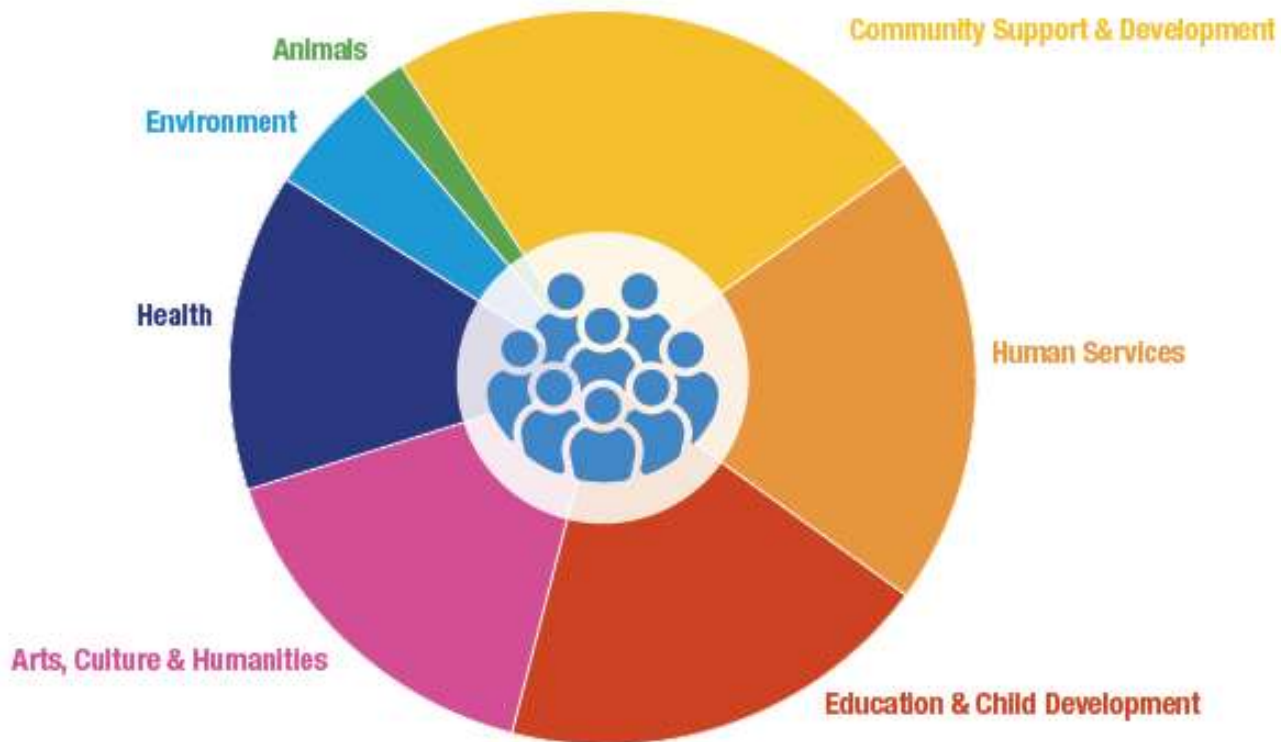


What Assistance is Available?

- Non-litigation, business law matters, in areas such as:
 - Corporate structure and governance
 - Contracts
 - Employment law
 - Environmental law
 - Intellectual property law
 - Real estate (including lease reviews)
 - Regulatory compliance (e.g., registration, annual reporting, charitable solicitation, lobbying)
 - Tax law and tax exempt status



98% of the Partnership's clients serve low-income individuals & provide important services in our communities



About Presenters

Sara Taylor, Staff Attorney, Pro Bono Partnership

Sara Taylor handles client matters for Pro Bono Partnership's Connecticut Program. She also assists with educational programming and volunteer outreach. Prior to joining the Partnership for her dream job, she worked in private practice and more recently served in various legal, compliance, and risk management roles in the insurance and financial services industries.

Roosevelt Smith, Roosevelt Smith Consulting

Roosevelt Smith has nearly three decades of rich and extensive experience in the nonprofit sector. Consulting work has included large, small and volunteer-run nonprofit organizations in a wide array of mission areas such as youth development, housing, human services, human rights/social justice, environmental justice, food justice and arts.



Introductions

POLL - Who's In the Room? Position (Founder, Board Member, Volunteer, other?)

Chat – Shout out your organization, what your mission is in a few words/one sentence.



Purpose & Agenda

Purpose: This series is for organizations considering the transition from a volunteer-only organization to a staffed organization.

AGENDA

- Opening & Welcome
- Organization's Vision of Impact
- Current Reality
- Transition Process
- Q & A - Wrap Up



Organization's Vision of Impact



Organization's Vision of Impact

"An organization is a **means** to **overcome the limitations** of **one person's contribution.**" ~Peter Drucker

"All organizations are organic and perishable. They are **created by people**, and they need to be constantly re-created if they are to survive".
~ Ken Robinson



Organization's Vision of Impact (cont'd)

What impact does your organization want to have?

Where are you going?

In relationship to your vision –

- *Why do you believe that you need to hire staff now?*
- *Do we need to grow?*
- *Is staffing the only way to grow?*



Organization's Vision of Impact (cont'd)

Good Reasons vs. Not-so-Good Reasons to Hire Staff

- *The “good”:*
 - *Demand for services and/or fundraising is exceeding volunteers’ ability to meet it*
 - *Volunteer and donor support is strong*
- *The “not-so-good”:*
 - *The nonprofit is struggling – engagement and donations are down; board looking for staff to “rescue”*
 - *The founder, a board member, or another key volunteer wants a paid role at the nonprofit, rather than continuing to volunteer*
- *An honest assessment is important at this stage*



Current Reality



Analyze Current Reality

- How do we know we are ready to hire staff? What is the current reality of your organization?
 - What positions/functions do we currently have?
 - How are those positions/functions serving where we want to go or the vision of impact we want to have?
 - What do we need right now to close the gap? Executive, Operational, Administrative, Programmatic, etc.
- What is the current state of our finances/budget?
- What can we afford to pay?
- Will the board need to adjust/elevate its fundraising efforts to generate enough funds for the position?



Analyze Current Reality (cont'd)

- Is the board committed and prepared to support, manage, and or partner with staff?
- Are there power dynamics involving a founder or founders that we will need to navigate?
- Is the board prepared to forego the old structure volunteer-only for a new structure with staff?
- What will the board need to let go of, or do differently?
- Does the board have all of the material that it needs to make an informed decision whether to hire?
 - Important to note that it is a *board* decision whether to hire – not an *individual* decision of the founder, board chair, major donor, etc.



Transition Process



Transition Process & Mechanics

- From the position/functions needs assessment – determine characteristics, role & responsibilities, desired skills and other qualifications.
- Which directors on the board have the expertise, capacity, and desire to lead the interview and onboarding processes? Who is willing and able to be the main contact?
 - A “hiring committee” approach is good, but someone should be the chair/leader
- What does our recruitment plan look like? Are there obvious candidates internally or will we conduct a search? If conducting a search, will we use a search firm, and can the organization bear the cost?



Transition Process & Mechanics (cont'd)

- If we are entertaining internal candidates, how do we manage a fair process and address conflicts of interest?
 - Following the organization's Conflict of Interest Policy (it's a good idea to have one)
 - If internal candidate is a board member – that person cannot be involved in discussions regarding the hiring process, salary determination, etc.
 - The remaining board members must do what is in the best interest of the organization
- Consider the adjustments that you'll need to make - Sacrifice what we are for what we would become – “The thing that the organization needs to let go of is the very thing that got it this far.” Use vision impact as a guide.
- Finally...attend Part 2 of this series: “We’ve decided to hire our first staff person! What are the initial legal and compliance issues we need to know?” March 7, 2024 at 12:00PM, registration available at www.hpl.org/library-service/nonprofits



Wrap Up



Wrap Up/Q & A

- Summary of Today's Session
- Additional Q & A
- Resources & Contact
- Survey – HFPG Close Out!

Thank you!



Thank you!

- Our sincere thanks go to
 - Daniel Alexandre of the Hartford Public Library; and
 - Monica Kelly, Traci Resler and Lucas Codognolla of the Nonprofit Support Program of the Hartford Foundation

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Resources

Passion Meets Professionalism: Transitioning From Volunteer Leaders To Paid Staff, Blue Avocado, May 15, 2022

Help Desk FAQ: Making the Leap from All-Volunteer to (gulp!) Paid Staff, Maine Association of Nonprofits, April 22, 2021



For More Information

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