

TANGO – BEST PRACTICES FOR NONPROFITS

By: Sharon Stone

Business Development



On November 17th we were a sponsoring presenter at an event organized by TANGO (www.tangoalliance.com) on best practices for nonprofits. The event covered a range of topics of interest to nonprofit organizations from navigating the social media landscape to health care reform, and included our presentation on Nuts & Bolts in Growing Your Organization.

Our practice leaders Chris Bertoncini (Finance), Saleha Walsh (Human Resources), and Russell Greenwald (Technology) presented to a packed room of nonprofit leaders outlining tools and steps for working more efficiently and effectively in the areas of Finance, Human Resources and Technology. Many best practices were detailed. Some thought-provoking comments from our presentation (which you can access by clicking on the link below) include:

- Finance – Finance is a service function for the rest of your organization
Communication and collaboration between finance and the rest of your organization is key
- Human Resources – The hiring process is an opportunity to market to all of the candidates you don't hire. Do it well and respectfully.
- Technology – Do you have confirmed backups of all your data?
Test this: Delete a file that has been stored on your system (after saving it again outside your system) and ask your IT support to provide you a copy of it – see how the process unfolds
- Mitigate risk – know what you know, get help where you need it

Threads that ran through the presentation can be summarized by: (1) Map where you want/need to head; (2) Put

systems in place when you recognize you need them, don't wait until the "opportune time"; (3) Systematize your processes – don't reinvent the wheel. Create checklists, forms, and templates that can be customized. This standardization supports your financial/program audits; it demonstrates your professionalism; and (4) Periodically assess your systems and practices to assure compliance, efficiency, and effectiveness.

We left the event empowered by the energy created by the more than 100 nonprofit leaders and professionals in attendance. The event sparked new dialogue and connections among the attendees. We trust that every attendee left with new tactics to propel their missions forward.

The concept of a periodic assessment of your systems and practices is a key best practice. At Insource Services, we are frequently engaged by clients to assess the current state of their systems and processes. We document the current system status, make recommendations, and prioritize and implement cost-effective solutions. What really distinguishes our team is our troubleshooting ability. We are adept at identifying and eliminating problems and differ from many consultants in that we have an operational focus and "own the problems" at our client organizations. Please contact us if you would like to learn more about our assessment services.



P.S. Unexpectedly, the Technology segment of the presentation was cut short by a fire alarm (false alarm). Therefore, Russell will be holding a webinar on Thursday, December 1st at 2pm to present his entire segment of our talk. If you are interested in participating in the webinar, please contact Sharon Stone at ssstone@insourceservices.com.

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