



THE GREATER SUM  
FOUNDATION

# Guide for Subject Matter Experts

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## Introduction

The Greater Sum's Volunteer Subject Matter Experts help nonprofit leaders to develop sound business plans that will guide them through start-up, expansion, impact analysis, or the roll-out of a new initiative. SME knowledge contributes to a shared library of nonprofit management resources. SME's also help The Greater Sum to invest funds in high-potential organizations by reviewing grant applications annually.

*The meaning of life is to find your gift. The purpose of life is to give it away.*

*-William Shakespeare*

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## **Subject Matter Expert Qualifications**

The Greater Sum's Subject Matter Experts bring a wealth of expertise and experience in their respective fields to their volunteer service. SME's have a track record of leadership, teamwork, and transforming concepts into reality.

## **Roles and Responsibilities**

The time commitment for Greater Sum SME varies based on your availability. SMEs can make a once-a-year commitment to review grant applications, and/or sign on to work directly with a nonprofit grant recipient in a short-term or long-term capacity. SMEs may also provide training or resources that are relevant to all Greater Sum grant recipients. Please contact [anna@thegreatersum.org](mailto:anna@thegreatersum.org) with any questions about your volunteer role.

## **Grant Review**

The Greater Sum reviews online grant applications on an annual basis. SMEs are invited to select the number of grant applications they would like to review, and will read applications and submit scores at your convenience within a 7-10 day period in September. Anticipate spending 10-15 minutes reviewing each application.

## **Grant Recipient Support**

Each nonprofit organization selected to receive grant funding from The Greater Sum will have a lead SME who will coordinate needed SME advisors for that organization. SMEs who answer the call should expect to spend 4-8 hours per month for a 6-12 month period working with the organization virtually. You may be invited to take part in a site visit on a voluntary basis. SMEs may also serve as more short-term advisors at a specific point in our collaboration with a nonprofit. That time commitment would be significantly smaller.

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## **Planning for Success**

Each funded organization will develop a project plan and target benchmarks for the year. The lead SME will track progress on the plan and engage additional SMEs as needed. When you begin work with a nonprofit project, you will receive a copy of the project plan and the point of contact SME will review your role with you.

## **Recipient Support**

The lead SME and any additional SMEs assigned to the project will communicate with nonprofits primarily virtually. The time commitment for Greater Sum SME's engaged in recipient support will be approximately 4 hours per month. This time will be made up of virtual communication and research done in preparation for productive meetings. SMEs may choose their technological preference for communication (phone, Google Hangout, Skype, etc).

SMEs are expected to be proactive in setting a mutually convenient meeting schedule and very clear in describing their availability. SMEs should recognize that nonprofit staff may be reluctant to place demands on the SME's time. Your communication will be more effective if you state your availability and preferences upfront.

Use this list of conversation topics to prepare for your introduction to a new nonprofit project.

- Share your professional and educational background and the scope of your current role.
- Share your reason for joining The Greater Sum as a SME and the type of support you are ready to provide.
- What's next? How and when will you meet? How will you prepare for your next conversation?

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- What's on the horizon? What would you like to accomplish together over the next few months?

It's also important to establish expectations during your first meeting. It may not feel 100% comfortable, but try to address the following topics so that you don't encounter roadblocks.

- **Accountability:** SMEs and nonprofit teams should both be committed to follow through on agreed-upon actions.
- **Confidentiality:** if you are privy to nonprofit client information you should follow their procedures for keeping information confidential. If you share information you should also share your expectations for confidentiality.
- **Boundaries:** The Greater Sum serves in an advisory capacity. We do not make decisions for our nonprofit teams, and we do not advise them beyond our areas of expertise. SMEs service is voluntary and there is no expectation on the amount or length of time they will be available to work with a nonprofit team.

Recipient support will look different for SMEs in different fields. You can expect to answer questions, provide references to pertinent resources, assist in evaluating quotes or proposals, and make introductions to people in your personal networks. If you work with clients you may want to outline the difference between advising your Greater Sum nonprofit team and the contractual relationship you have with paying clients. Please contact [anna@thegreatersum.org](mailto:anna@thegreatersum.org) if you have any questions about the boundaries of your volunteer work.

## **Checking In**

SMEs log their volunteer hours on The Greater Sum website. When you log volunteer hours you are helping The Greater Sum to track our progress towards our goal of supporting innovation in the nonprofit sector. Logging hours is critical

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to our organization and SMEs on active projects will receive reminder e-mails with a link to our volunteer page on a regular basis.

The lead SME on each funded project will report to the Greater Sum Board of Directors on the agency's progress quarterly. SMEs will be invited to give feedback on their experience working with the nonprofit team, and input on what additional resources may be needed to support the team.

### **Closure & Evaluation**

After one year, funded organizations will submit a final report on the progress that has been made on project goals. SMEs will be invited to make recommendations for next steps, and to share with The Greater Sum Board of Directors their insights from this first year of nonprofit collaboration.

### **The Greater Sum Community**

We at The Greater Sum Foundation believe community members and nonprofit leaders, working together, can solve the pressing problems of today -- and preempt the problems of tomorrow. Capturing and sharing best practices from our funded projects is an important part of how we share knowledge among our community of SMEs and nonprofit partners. We encourage SMEs to write white papers and blog posts for the Greater Sum website. Please join our Facebook and Twitter conversations @GreaterSumFound and share successes, challenges, and lessons learned from your work as a SME!

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## Resources

### MENTORING

Johnson, W. Brad & Ridley, Charles R. *The Elements of Mentoring: The 65 Key Elements of Coaching, Revised Edition*. 2008.

Zachary, Lois J & Fischler, Lory A. *Starting Strong: A Mentoring Fable*. 2014.

Weiston-Serdan, Torie. *Critical Mentoring: A Practical Guide*. 2017.

Five Minute Favors:

<https://www.forbes.com/sites/kareanderson/2013/07/17/pay-it-forward-with-the-five-minute-favor/#791d49426f5d>

### NONPROFIT MANAGEMENT

Pallotta, Dan. *Uncharitable: How Restraints on Nonprofits Undermine their Potential*. 2008.

Heyman, Darian Rodriguez. *Nonprofit Management 101*. 2011.

Everything you need to know to start a 501(c)(3) organization:

<https://www.wildapricot.com/blogs/newsblog/2017/05/24/how-to-start-a-nonprofit>

Nonprofit Finance Study: Managing Growth (2017)

<http://www.abila.com/lp/growth-study>

### SOCIAL ENTREPRENEURSHIP

Martin, Roger L. and Osberg, Sally R., *Getting Beyond Better: How Social Entrepreneurship Works*. 2015.

Seelos, Christian and Mair, Johanna. *Innovation and Scaling for Impact: How Effective Social Enterprises Do It*. 2017

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What is Social Entrepreneurship?

[http://www.youtube.com/watch?v=KrrF\\_LrIYus#t=11](http://www.youtube.com/watch?v=KrrF_LrIYus#t=11)

Stanford toolkit for social ventures (Includes Social Business Model Canvas):

<http://sehub.stanford.edu/pro-1>

Learn from Failures:

<https://nonprofitquarterly.org/2017/08/23/humbling-nonprofit-lessons-bold-startup>

## **IMPACT**

17 Global Goals set by 193 world leaders establish a roadmap for sustainable development: <http://www.globalgoals.org/>

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## **VOLUNTEER POLICY FORM**

I have agreed to work as a volunteer for The Greater Sum Foundation and do so of my own free will. As a volunteer I am not an employee or agent of The Greater Sum. I understand this role does not include compensation or payment of any kind. Furthermore, I acknowledge that The Greater Sum does not offer health insurance, workers' compensation insurance, or any such employee benefit to volunteers.

\_\_\_\_\_ I have read the detailed Guide for Subject Matter Experts for the volunteer duties I am accepting and understand the minimum requirements. I have read and understand The Greater Sum's mission statement and best practice procedures. I pledge to act and perform within those expectations.

\_\_\_\_\_ I understand that I may learn confidential or sensitive information during my volunteer service. I agree to maintain confidentiality of all information disclosed to me during my volunteer service.

\_\_\_\_\_ I will record my volunteer service hours regularly, respond to Greater Sum inquiries about the progress of my volunteer service, and notify The Greater Sum staff if for any reason I am no longer able to fulfill my volunteer commitment.

\_\_\_\_\_ I shall not perform professional services on behalf of The Greater Sum for which certification or licensing is required unless currently certified or licensed to do so.

I acknowledge that The Greater Sum does not guarantee safety. I voluntarily waive, release, and hold harmless The Greater Sum, its board, employees, agents, and other volunteers from all claims, accidents, injuries, or death that result from actions related to my volunteer activities. I understand that this document disqualifies me from recovering damages against The Greater Sum should I be injured in the course of my duties. I shall defend, hold harmless, and indemnify The Greater Sum, its board, employees, agents, and other volunteers from and against all claims, accusations, notices, judgments, rulings, liabilities, expenses, etc. that may exist as a result of my actions, inactions, errors, acts, or omissions.

I have read and fully understand the above waiver. I understand that by signing this document I am giving up certain rights and accepting certain duties.

Volunteer signature: \_\_\_\_\_ Date: \_\_\_\_\_

\*This copy is for your records. You must submit a Volunteer Policy Form with electronic signature via e-mail to [anna@thegreatersum.org](mailto:anna@thegreatersum.org) prior to service as a Greater Sum volunteer.