

Check out the announcement of our new location and the spring "1 2 3 and Done" Expert Series Group Consulting opportunities it will allow us to provide. You are receiving this new monthly e-publication as a subscriber to the Not-for-Profit News. This brief monthly publication shares what Charitable Advisors is seeing and learning in our work with nonprofits across the state. If this material is not of interest, you can unsubscribe at any time. To unsubscribe, click the unsubscribe link in the footer.

We encourage you to share the new e-publication with your board leaders. [Forward this email to board members](#)



Frontline Perspectives

FOR NONPROFIT BOARD AND STAFF LEADERS

March 2017

Bryan Orander, president, Charitable Advisors

Are You Growing the Capacity of Your Organization?

International consulting firm McKinsey & Company is typically given credit for defining "Aspiration and Leadership" as the biggest drivers of nonprofit success. It is a big vision or goal that inspires a capable team of people (staff and/or volunteers) to make it happen. While it seems simplistic, it is hard to argue with the insight.

Charitable Advisors has had the unique opportunity to work with a cohort of 20 nonprofit organizations over the past nine years in partnership with the Foellinger Foundation, a Fort Wayne-based private foundation. During this time, we have seen amazing organizational growth and impact and we have also seen organizations stuck on a plateau or even collapsing.

Our primary role with each of these organizations has been to support an active thinking process about every three years to help them reflect on how they are building and need to build their capacity to effectively serve their clients and financially sustain their work.

We have watched the impact of "the presence of aspiration and leadership" and the consequences that an "absence of aspiration and leadership" can have.

With permission from the Foellinger Foundation, [here is the working paper that Charitable Advisors authored last summer](#), in partnership with foundation leaders. Its content is based on what we have observed to be key contributors to effective and intentional strengthening of these nonprofit organizations. Look specifically at pages 7 and 9 to identify ideas you can apply to move your organization to the next level.

Contact Bryan at 317-752-7153 or Bryan@CharitableAdvisors.com to learn more or talk about applying these insights to your organization.



Engage your board in real thinking and discussion

Does every board meeting feel the same? Can you recall the last time the leadership team wrestled with a real decision?

No wonder board members care but don't engage.

Here are a couple ideas for changing your board meeting dynamic from authors Richard Chait, William Ryan and Barbara Taylor in their book, "Governance as Leadership."

Role plays

Ask board members to assume the perspective of different stakeholders and speak to the issue from that perspective.

A client of Charitable Advisors recruited two attorneys from their board and had them prepare and present the cases "for" and "against" board term limits to the full board prior to a discussion on the topic. Board members still mention it years later.

Breakouts

Divide the board into smaller groups for the start of a discussion or to dig deeper.

From CA's experience, this allows for more board members to voice their thoughts and opinions and typically produces multiple ideas or possibilities

BIG NEWS | Group Consulting begins. Join us this spring

"1 2 3 and Done" Expert Series Group Consulting

Last fall, Charitable Advisors did a listening tour with some small to mid-sized nonprofits and a few area funders. Our goal was to identify fund-raising consulting needs and possible niches for us to serve. There was near universal agreement about the high development needs of smaller organizations - those with no dedicated fund development staff or the infamous "one-person development office." There was also near unanimous agreement that these organizations did not have the budgets to hire the traditional, dedicated fund-raising consultant or even the time to research and hire. Webinars and episodic training events seldom met their needs.



To step in and fill the void, this spring we will offer five "Group Consulting" opportunities. Groups will be four to eight participants. Over a 30- to 60-day period, each group meets three times for 2 ½ hours with an experienced consultant in their area of specialty. Participants will leave the third session with a finished product or final draft, depending on the topic. Between sessions, there will be specific homework and a brief one-to-one phone check in with the consultant.

This will provide small-to-mid sized nonprofits access to industry experts in an affordable format with a specific, tangible end-result. Think of it as saving money by splitting the cost of your personal trainer with several friends.

- Create a Donor Engagement Tool to launch your major gift effort with T.J. McGovern
- Prepare to Hire and Retain your Development Director with Jessica White
- Build a Framework for Grant Research and Proposal Development with John Borders
- Getting Your Stakeholder Communications in Shape with Mark Eutsler, Ph D
- Capture Compelling Success Stories with Nora Hiatt

Spring seats are limited for each topic. Signups start today. We will schedule specific dates after first four registrations are in. [See more information and registration here.](#)

We welcome your thoughts and questions. Contact Bryan@CharitableAdvisors.com or Julie@CharitableAdvisors.com.



SEEKING WISDOM

(Last month we posed a nonprofit leadership situation and asked for reader input to address it. We were surprised by the low volume of responses, but hope this feature will gain traction over the coming months.)

The question was posed by a board officer who was concerned about the lack of leaders on the board beyond the executive committee and asked, **"Who are the next board leaders?"**

I would like to keep this discussion going by proposing several approaches and asking for reader input on these or other directions this organization might take.

- Grow your own: Approach the most capable one or two current board members and propose a 1-2 year transition to bring them up to speed and transition key leadership roles.
- External recruiting: Recruit some new "leaders" to your board. Too often, boards recruit "members," well-meaning people who have not led in other settings.
- Recruit interim or transitional leadership: Sometimes, organizations will bring back a former board leader or recruit a community champion to take the board chair role for a short transition.

What have you seen to be effective? What other options could they consider?

Share your feedback by e-mail to: Bryan@CharitableAdvisors.com or on our [Facebook page](#).

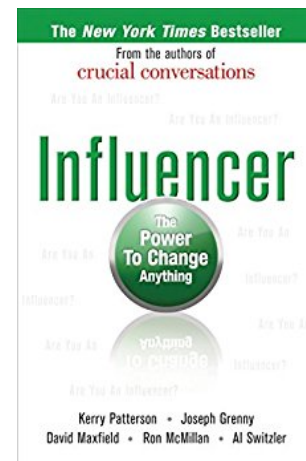
Submit your situational or ethical dilemma here



YOUR READING LIST

"Influencer: The Power to Change Anything" by Kerry Patterson, Joseph Grenny, David Maxfield, Ron McMillan and Gareth Jones (McGraw-Hill, 2007).

I was introduced to this material at a leadership event and have seen application in the nonprofit sector. Some concepts, like positive deviance, have been widely circulated. But it includes so much more information about how we tend to do the least we can to get something done, even in very important situations, instead of creating a situation and environment that can actively reinforce the desired changes. [For a review of the book, click here.](#)



SELECTED CHARITABLE ADVISORS NONPROFIT RESOURCES

[Nonprofit Job Board](#)

[Real estate to lease or for events/meetings](#)

[How to place a Job ad](#)

I started Charitable Advisors in 2000 with a vision to offer more than traditional consulting services and to become a connector, advocate, and problem solver for the nonprofit sector. This approach has made Charitable Advisors a critical component of the central Indiana nonprofit infrastructure. Over the past 6-7 years, we have supported more nonprofits through leadership transitions and retirements than any other area firm. Nonprofits post 1,000 job openings each year on our nonprofit job board. We research and publish the local nonprofit salary survey and we keep thousands of nonprofit leaders informed each week through the Indianapolis Not-for-profit News e-mail newsletter.

Contact me if your organization is preparing for its next strategic planning cycle, envisioning a new focus on board development, or preparing for a planned or unexpected leadership transition.

Bryan Orander, President - Charitable Advisors



STAY CONNECTED

