

Check out highlights from our recent Frontline Perspectives Executive Event below.

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Frontline Perspectives

FOR NONPROFIT BOARD AND STAFF LEADERS

May 2017

Bryan Orander, president, Charitable Advisors



Is your board structured for success?

What is the #1 reason why boards are a certain size, maintain a certain committee structure or current meeting frequency?

Research tells us that the main reason is "because we have always done it that way". Ouch!

More and more area nonprofits contact me to talk about board committee structure and board member engagement. They want an environment where board members can engage their skills and passions in ways that positively influence the organization's impact and financial sustainability.

Every board is different and should be organized around the priorities and people from the organization. Still, there are some common challenges:

- executive committees that, usually unintentionally, take power and authority from the broader board

- lax board orientations
- infrequent or irregular meetings that leave board members unprepared to engage in the work of the organization
- limited investment in board leadership development

Charitable Advisors developed a short [White Paper \(download below\)](#) last year to brief board and staff leaders on some of the best practices for board structure and provide some insights on thinking beyond the traditional, functional board structure, which the majority of nonprofit boards typically adopt.

Please download ["Introduction to the Doug Eadie Board Model"](#).

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



QUICK TIP

"We need more diversity on our board"

Increasing board diversity is one of the top three governance priorities of almost every organization that we've interacted with through training, consulting or general discussion.

Motivators range from a sincere desire to broaden perspectives or increase board members understanding of the community to simply complying with a funder mandate.

It can be difficult to know where to start. BoardSource did significant research in this area several years ago and released a **FREE TOOLKIT** that can equip a board committee or task force in assembling a plan of action and training the full board.

Download ["Diversity in Action"](#).



LEARNING OPPORTUNITIES

Insights from first Frontline Perspectives Executive May 2 event

One motivation for Charitable Advisors' recent move to Castleton Office Park on the northeast side was convenient access to a larger meeting space. With additional space, we envisioned bringing nonprofit leaders together around important issues, to connect with each other and to learn together.

On May 2, we did just that. More than 50 participants joined Charitable Advisors as we hosted our first nonprofit leadership event focused on two trending topics - Cybercrime and Fund development staffing.

For presenters, we reached out to our capable corps of newsletter sponsors and recruited eight experts. They shared new perspectives around fraud, Internet and online security and discussed the perceived talent shortage of capable development professionals.

"Don't fall victim to cybercrime"

Panelists included:

- **Evan Thomas**, *First Vice President and Chief Technology Officer at The National Bank of Indianapolis*
- **Yvonne de Calonne**, *CPA- Shareholder, VonLehman CPA & Advisory Firm*
- **Cody Lents**, *Business Development, Netlink, Inc.*
- **Mike Farmer**, *CPA and Director, Aldering CPA Group*



Key takeaways:

- It will likely happen to you but you can reduce the impact.
- There were at least two recent ransomware attacks among attendees
- Train your staff to verify financial transfers and avoid blindly clicking on links
- Protect phones and laptops (with passwords and from theft)
- Backup everything
- Start with an auditors' or IT providers risk reduction assessment tool

"Navigating the people side of fund development"

Panelists included:

- **Genevieve Shaker**, *Assistant Professor of Philanthropic Studies, Lilly Family School of Philanthropy*
- **Angela White**, *CEO, Johnson Grossnickle & Associates*
- **Jen Pendleton**, *Vice President Indiana, Aly Sterling Philanthropy*
- **Paul Ashley**, *Managing Director, FirstPerson Advisory*



Key takeaways:

- Take the time to connect new fundraisers to your mission. Make the job about advancing the mission, not just churning dollars.
- A "culture of philanthropy" builds board, CEO and organizational teamwork with the development leader/department.
- Development directors can use data to communicate with organizational leaders and maximize fund raising efforts.
- Performance feedback and evaluation needs to be on-going and reinforce both short-term and long-term goals, in alignment with the strategic plan.

Contact Julie@CharitableAdvisors.com if you would like to be connected to any of the experts for a follow-up conversation.

"1 2 3 and Done" Expert Series - Group Consulting - Fall 2017

In late March, we announced an exciting approach to making fund-development consulting accessible to small- to mid-sized nonprofits.

While recruiting for spring sessions is wrapping up, we look forward to bringing some of these topics back in the fall. We are also planning to add several topics - perhaps around organizational dashboards and staff recruiting and retention. Let us know of your topical interests.

Click [HERE](#) for more information.

We welcome your thoughts and questions about Group Consulting and how we can make it attractive for your organization. Contact Bryan@CharitableAdvisors.com or Julie@CharitableAdvisors.com.



YOUR READING LIST

"Influencer: The New Science of Leading Change"

by Grenny, Patterson, Maxfield, McMillan

I was introduced to Influencer by a foundation client who regularly hosts leadership training events.

The material is applicable to most settings -- personal and professional -- and builds on the premise that we seldom think through the change we are hoping to accomplish and how we can create sufficient factors for success. This book gives you an easy-to-understand process and the summary we've included is so thorough you may be able to skip reading the book.

[Book overview/summary](#)



SELECTED CHARITABLE ADVISORS NONPROFIT RESOURCES

[Nonprofit Job Board](#)

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

[How to place a Job ad](#)

[2016 Charitable Advisors Nonprofit Salary Survey](#)

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

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