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Frontline Perspectives

FOR NONPROFIT BOARD AND STAFF LEADERS

February
2018

Bryan Orander, president, Charitable Advisors



"Is our nonprofit staff leader the CEO, President or Executive Director?"

Last year, Charitable Advisors assisted 12 area nonprofits with leadership transitions and to recruit new leaders. A common topic in early conversations with leadership and search committees is to discuss a position's title along with compensation.

Typically, I consider leadership titles interchangeable for most circumstances and their use most often seems driven by past practice and organizational size. However in general, I see the executive director (ED) title used for organizations until they develop leadership teams. Often between the \$1 and \$2 million annual revenue range is when I've seen staff director teams forming, and closer to \$5 million when a vice president title (VP, CFO, CDO, COO, etc.) becomes more common.

I often hear an argument for CEO (Chief Executive Officer) or president & CEO from organizations that

interact with corporate leaders and don't want to come across as too "nonprofit."

President & CEO or CEO is also viewed as more attractive when recruiting a new leader or if the leader has come from the for-profit world where the executive director title is unusual. I have had EDs of some larger organizations tell me they have retained the ED title because of a perception that when they get out into their more rural or urban service areas, CEO sounds "too corporate" for some stakeholders.

When in doubt, I suggest "president" as a middle ground for organizations that have smaller staffs but want to step up from the nonprofit feel of ED.

Another point of potential confusion is that the title "president" can be used for either the staff or board leader. My preference for the board leader is to use the "board chair" title to avoid confusion.

Succession Planning Conversations

You don't need to wait, however, for a leadership transition to have this conversation. A recent client with a \$5 million annual budget elected to update from executive director to president & CEO, the year before its long-term leader retired. She greatly appreciated their gesture.

To further explore this topic, contact Bryan Orander at Bryan@CharitableAdvisors.com or 317-752-7153.

Salary Survey

Our Nonprofit Salary Survey launches March 5.

Charitable Advisors' fifth bi-annual Central Indiana Nonprofit Salary Survey will launch in next month. If you haven't already sent us your best survey contact person, please let Kathleen Poland know at Kathleen@CharitableAdvisors.com.

Reminder

Salary Survey Sponsorship Opportunity

If you would like to sponsor the Nonprofit Salary Survey, please contact Julie Struble at Julie@CharitableAdvisors.com by Feb. 9 for more information.

Thank you to our returning survey sponsors.

-The National Bank of Indianapolis, FirstPerson Advisors and VonLehman CPA.



QUICK TIP

Avoiding Trouble as a Board Member

While some board trainers choose to emphasize the potential liabilities of board service, my focus is always on the impact that an engaged board member can have through their service and the opportunities for personal and professional development and relationship building.

However, there are risks involved, especially for the board and/or board member that are not attentive to their roles.

Here is a BoardSource tool that could be a great addition to a finance or governance committee agenda. Anecdotally, the most common issues that can directly have an impact on board members are non-payment of employment taxes (FICA) and wrongful termination claims (always consult an attorney).



[Click HERE to find out out the Top 10 Ways to Get Investigated by a State Regulator](#)

Share your board questions and ideas about diversity with us at Bryan@CharitableAdvisors.com so we can share them in a future "Quick Tip".



LEARNING OPPORTUNITIES

Major Gifts with T.J. McGovern

Last fall, we launched our "Group Consulting" approach to make professional consulting advice affordable for smaller nonprofits.

We partnered with T.J. McGovern to successfully support four small nonprofits to refine their message, develop a major gifts plan of action and take their first steps of implementation.

[Click HERE to learn more.](#)

Again, this year, we are partnering with T.J. so you can walk away with an engagement tool and funding plan to support the vision of your organization.

Create a Donor Engagement Tool to Launch Your Major Gift Effort is a three-part series that starts on Friday, March 9 from 9:00 - 11:30 a.m. at Charitable Advisors' new offices (8604 N. Allisonville Road, Suite #115). The other two sessions' times and days will be scheduled based on participants' schedules. Cost is only \$795 for all three sessions and includes one-to-one check-ins between sessions.

As an outcome of these sessions, you will walk away with an engagement tool and funding plan to fund your organization's vision.

- You will clarify your organization's reason for existence, identify major buckets of philanthropic opportunity and do the math to create a strong funding rationale that acts as a blue print to accomplish your mission and fund your vision.
- You will have a simple visual presentation tool to support the dialogue on actual visits with a qualified prospect at the end of the session.
- You will complete a 1,000-day fundraising plan to put your efforts in motion.

[Click HERE to register and learn more.](#)

Still have questions? Feel free to contact T.J. at 317-588-6110 or tj@mcgimpact.com.



T.J. McGovern



YOUR READING LIST

Nonprofit Strategy Revolution: Real-time Strategic Planning in a Rapid Response World

by David La Piana (2008)

This is a long-time favorite that I keep coming back to. The major theme is that there is not enough strategy in nonprofit strategic planning.

While I have not found his full planning system matches my planning tastes, the essence of focusing more on strategy is key to nonprofit success.

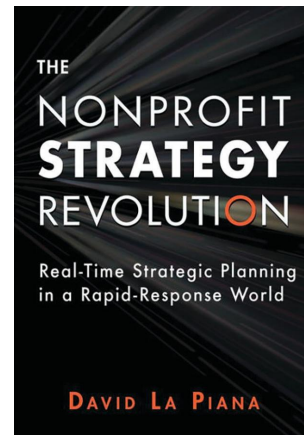
If you feel your strategic plans are mainly "wish lists" and "to-do lists" this book will be helpful.

[More HERE at La Piana's website.](#)

What titles are you recommending to your colleagues?

Bryan Orander

Bryan@CharitableAdvisors.com



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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