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

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Charitable Advisors
FUNDRAISING • PLANNING • NOT-FOR-PROFIT NEWS

Frontline Perspectives

FOR NONPROFIT BOARD AND STAFF LEADERS

July 2017

Bryan Orander, president, Charitable Advisors

CEO succession planning is no longer just retirement

I was interviewing a 30-something arts organization's CEO in March about leadership and staff development and the discussion turned to CEO turnover and succession planning.

I explained that more than half of the leadership transitions we support are for retiring nonprofit executives. She surprised me by taking the conversation in a different direction by sharing that she feels most successful leaders her age see their roles as 3-5 years and then they want to move to a different challenge to continue to grow as leaders.

This may be an emerging trend to watch. Looking at the last thirty leadership transitions we have supported, only two have had tenures less than two years, but two clients from 2013 have recently called us as their young, successful leaders moved to new opportunities.

That means that board and staff leaders need to be extra vigilant in defining what succession planning looks like to sustain their organizations:

Succession planning for retirement

Traditionally, serious succession planning is done when an older leader is willing to share that they see retirement on the horizon. From past experience, this is sometimes ignored by the board, hoping it is an idea that will pass. More appropriately, it triggers conversations about reviewing/grooming potential internal successors and taking the leader's retirement into account in organizational planning.

Do it without the pending retirement

Every organization has the opportunity to approach succession planning to prepare for an unexpected leadership departure plus the chance to attract and develop more staff and board leaders. These discussions also have the positive side effect of making those key roles more "do-able" by actively sharing leadership with others.

For its direct and concise explanations, one of my favorite resources on this topic is a white paper written by my friend and Noblesville native Tim Wolford for the Annie E. Casey Foundation called Building Leaderful Organizations.

Your funders and donors care

For years, United Way has mandated that organizations have written succession plans. Foundation leaders are very aware of how important leaders are to their grantee organizations, and also that every capable leader eventually leaves.

Are you prepared?

What's your plan if your senior leader gives a year's notice or becomes ill, or your younger leader gives you a few week's notice?

Work with Charitable Advisors this Fall

- Bryan Orander of Charitable Advisors will be leading a group consulting/coaching opportunity this September around succession planning and preparing for leadership transition. You may bring two representatives from your organization for two working sessions with Bryan and four other nonprofits focused on the same task. Where else can you get a customized succession and senior staff development plan in a month's time for less than $500?

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

QUICK TIP

Are your board members impressed?

If your board members are typical, they spend at least two-thirds of the time they engage with your organization in board and committee meetings, some 100 percent. Whether expressed or not, they are constantly asking "Does the work of this organization make a real difference with the people we are supposed to be serving?" "Are we effectively utilizing the resources we receive from donors and funders?" "Is this organization making good use of my talents and the time I am investing in it?"

Here are a couple quick links to help you create better board meeting experiences and equip your board members to be more enthusiastic ambassadors for your cause.

Five Tips for Better Board Packets

Ten Quick Ways to Invigorate Board Meetings

LEARNING OPPORTUNITIES

"1 2 3 and Done" Expert Group Consulting Re-launches this fall

While the promotion of Charitable Advisors' new group consulting/coaching in the spring created lots of energy and positive feedback, we also heard that we did not provide adequate notice to arrange schedules and to find the very reasonable $695 program fee.

As a reminder: The general concept for "1 2 3 and Done" Expert Group Consulting is that in two to three working sessions with an expert consultant and a cohort of other nonprofit leaders/staff, you will complete a project or produce a product that will advance your fund development or leadership efforts. We project savings of at least 70-80 percent compared to vetting and hiring a consultant to work on the same project.

1. Work side by side with an Expert Consultant
2. Peer Group sharing
3. Tangible outcome/result, not just a general increase in subject knowledge

Fall sessions

This fall, we will offer three topics:

- **Create a donor engagement tool to launch your major gift effort**
  with T.J. McGovern (3 sessions)
- **Capture compelling success stories**
  with Nora Hiatt (3 sessions)
- **CEO Succession planning is no longer just for retirement**
  with Bryan Orander (2 sessions)

See a Q&A on Group Consulting at: http://charitableadvisors.com/consulting/groupconsulting/or contact Bryan Orander at Bryan@CharitableAdvisors.com or 317-752-7153.

Watch for our early August article - **"How to raise $695"** focused on helping busy nonprofit leaders like you find the funds to participate. (Hints: Ask a board member, Ask your CFO, Ask a funder to offer scholarships to a few grantees.)

YOUR READING LIST

More podcasts

I received several follow up e-mails about my recommended podcasts last month so it appears that many of you have also caught the bug. Our good friend Andy Frazier, Executive Director at Prosperity Indiana, shared his list of favorites, beginning with the organization's podcast **Ways and Means**

Andy' s other favorites include:

- The Productivityist podcast
- Nonprofit Ally
- Nonprofit Radio
- Cool Things Entrepreneurs Do
- Read to Lead
- ProdPod
- Beyond the ToDo List

If you haven't tried listening to podcasts yet, just click on the podcast app on your phone and explore all that's available - and free.

Let me know what you are listening to.

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 though 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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STAY CONNECTED