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

Frontline Perspectives

FOR NONPROFIT BOARD AND STAFF LEADERS

December
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Bryan Orander, president, Charitable Advisors



Board Member Thinking Beyond "The 10 Key Responsibilities"

Do you recall ever being in a new situation where your supervisor or a person in authority gave you a job description or list of all the things included in your role and then wished you luck?

My first reaction to that type of situation is usually: "But wait, where do I start? What do I actually need to do? How will I know when I am succeeding?"

Often, I think we expect new nonprofit board members to figure it out with just a little direction. One classic outline is BoardSource's popular publication, "The 10 Key Responsibilities of a Nonprofit Board." While a helpful tool, it is a bit like giving a baseball rules book to a young person who has never touched a baseball before. www.BoardSource.org

At BoardSource's national conference in October, there was a great opportunity to hear how different leaders and organizations more clearly express and convey the expectations of board members. Here are two ideas - attitude and orientation - to think about and communicate to your board members, whether you are a board or staff leader.

Desired attitude or approach by Board Members

- **Think strategically**
- **Connect to other leaders**
- **Advocate for the community you are serving**
- **Focus on the future**
- **Steward of your organizational brand and trust**

This short list can help board members better grasp a few key approaches they can take in the board room and out in the community. Consider talking through the list at an upcoming board meeting. In breakout groups, board members can talk through all five or break into five smaller groups and then debrief as a whole group.

Does your new board member orientation involve handing over a pile of policies during a conversation with the ED/CEO? One conference presenter suggested setting these four goals for your initial and on-going orientation and board development processes.

New board member orientation

- **Impact experiences:** Put your new board members as close to your work as you can
- **Mission moments:** Every board meeting should include the story of a life changed
- **Continuous learning:** Provide regular opportunities to learn about the organization, its work, and the field of work
- **Build their own story:** Over their first couple months, help new board members link their personal background and passions with those of the organization and define how they talk about the organization and why they are involved

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



QUICK TIP

Theme of BoardSource Conference: Diversity

"Diversity is being invited to the dance. Inclusion is being asked to dance. Equity is having your music played."

While this looks different in every organization, BoardSource reports that most boards are struggling to develop and maintain diverse membership.

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

Make Personal and Professional Development Intentional in 2018

We are all busy and often merely pushing to get through today or this next week.

As the year's end approaches, it is important to take time to think with your team members and also reflect on your own priorities for 2018. What will personally and professionally enhance your life and develop your career?

The following simple framework can help make your development more intentional and can be added to each of your team members' plans for 2018.

What can I do to:

- **Reflect and refresh**
- **Add or strengthen a skill**
- **Stretch to connect with a new topic or culture or person**

As Charitable Advisors develops our plans for 2018, drop me an email at Bryan@CharitableAdvisors.com to share what you are planning or what you need in 2018.

Coming up...

Next spring, we will be repeating our Expert Group Consulting offerings on Succession Planning and Major Gift fundraising. Registration and promotion will begin in January and participation will be limited to six organizations per topic.



YOUR READING LIST

**No One Dreams of Being a Fundraiser:
My Unexpected Journey from Music to Major Gifts**
by Mitchell Linker (2017)

[Click here](#) to watch a 2-minute video intro by the author.

What titles are you recommending to your colleagues?

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[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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