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

Frontline Perspectives

FOR NONPROFIT BOARD AND STAFF LEADERS

November
2017

Bryan Orander, president, Charitable Advisors



Take Your Board/Staff on a Road Trip

It has probably been 10 years, maybe longer, since I learned from a colleague about the intentionality and investment that the Annie E. Casey Foundation in Maryland puts into arranging for its grantees to visit programs in other communities.

Since that time, I have suggested and then seen many organizations benefit from getting their leaders out of the bubble of their local efforts to see how another nonprofit, usually the same type of program, does its work.

From my personal experience, the results have been as simple as a better understanding and respect for the work of their own organization and as dramatic as board members taking the lead

to replicate a fund-raising event that generates \$25K a year or the creation of a new program based on the proven success of a peer organization in another community.

If your nonprofit is considering a trip like this, think about what you want to learn, reach out through your networks and national associations to identify organizations that are especially effective or innovative in the work you want to refine or learn more about. Contact the organization in advance and talk about what you hope to learn. See if you can meet with a board member(s) of the organization being visited.

In addition to the on-site learning, the connections between the people who travel are enhanced through the travel time together and processing the shared experience.

For a recent Nonprofit Quarterly article that expands on the concept: [Click here](#)

For more information, contact Bryan Orander at Bryan@CharitableAdvisors.com or 317-752-7153.

ALERT - WE WANT TO SHARE OFFICE SPACE

Charitable Advisors is looking for a new office in 2018. We want to share office space with a nonprofit or community-minded business on Indianapolis' North or Northeast side. Our team work from home and in the office so we need space for 3-4 people plus access to a conference or training space. Sharing internet and a copier would be ideal. Target rental budget is \$800-\$1,000/mo.

Contact Kathleen Poland, Administrative Coordinator at Kathleen@CharitableAdvisors.com or 317-501-5072.



QUICK TIP

Tip #1 from the 2017 BoardSource National Conference

Every two years, BoardSource, a national nonprofit focused on building effective nonprofit boards, convenes 800-1,000 nonprofit leaders to share best practices and research.

This year the conference was in Seattle, and over the next couple of months, I will share some of the insights I took away from sessions.

Barriers to Board Success

As you prepare to bring your next cohort of new board members onto your board, here are three typical barriers that were identified by the board training leader of a national nonprofit coalition:

- **Unclear expectations:**
What am I expected to do to be a truly effective board member? (not the minimum to just get by)
- **Limited knowledge about the organization and the board's role:**
How can you give new board members an experience with clients or learning directly about your mission? How will you help them learn more about how the board works?
- **No opportunities to activate and engage:**
DO NOT give new members time to "settle in". Immediately, learn what they want to know, and then give each a specific task and committee or project to be a part of as they get connected and engaged.



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



LEARNING OPPORTUNITIES

Update on Charitable Advisors Expert Group Consulting Series

You might recall that we referred to this new approach as "1, 2, 3 and Done" because of three key components:

1. Work side-by-side with an expert consultant
2. Share ideas with peers in a group setting
3. Produce a tangible outcome, as well as gaining an increase in subject knowledge

Last week marked the second meetings of our two Group Consulting series. I have led a two-session series on Succession Planning. Two representatives from five organizations have developed or refined Emergency Succession Plans, developed staff contingency plans and discussed both staff development strategies and board development strategies.

T.J. McGovern has been working with four organizations to examine how they prepare for and work with major donors. After two of the three sessions, T.J.'s feedback has been outstanding and it is clear that participants are looking at their organizations in new ways and gaining the confidence to take action where they hesitated in the past.

We will be evaluating what we learned in this first cycle, and plan to offer both sessions again in the spring. Let me know if you would like to be among the first to know when the offerings are scheduled.

Contact me at: Bryan@CharitableAdvisors.com



T.J. McGovern



YOUR READING LIST

A Nonprofit Reading List to Prepare for the New Year

Here is a strong "Top 10" list from nonprofit consultant and author Joan Garry. Time to begin your Christmas, Hanukkah, or holiday list or add to your Amazon Wish List.

To check out Garry's short reviews of the titles: [Click here](#)

1. ***Good to Great and the Social Sectors*** by Jim Collins (2001)
2. ***Give and Take*** by Adam Grant (2013)
3. ***Changing Minds*** by Howard Gardner (2006)
4. ***Difficult Conversations*** by Stone, Patton and Heen (1999)
5. ***Made to Stick*** by Dan and Chip Heath (2006)
6. ***Start with Why*** by Simon Sinek (2009)
7. ***It's Your Ship*** by Mike Abrashoff (2002)
8. ***Getting Things Done*** by David Allen (2001)
9. ***How the Way We Talk Can Change the Way We Work*** by Kegan, Lahey and Martin (2016)
10. ***Tribal Leadership: Leveraging Natural Groups to Build a Thriving Organization*** by Logan, King, and Fisher-Wright (2008)



Joan Garry

What titles are you recommending to your colleagues?

Bryan Orander
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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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