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**Charitable Advisors**  
LEADERSHIP TRANSITION • PLANNING • NOT-FOR-PROFIT NEWS

# Frontline Perspectives

FOR NONPROFIT BOARD AND STAFF LEADERS

*April 2018*

*Bryan Orander, president, Charitable Advisors*

**Charitable Advisors**  
LEADERSHIP TRANSITION • PLANNING • NOT-FOR-PROFIT NEWS

 **charitable allies**  
your nonprofit advocate

## Collaborations & Combinations event on May 2



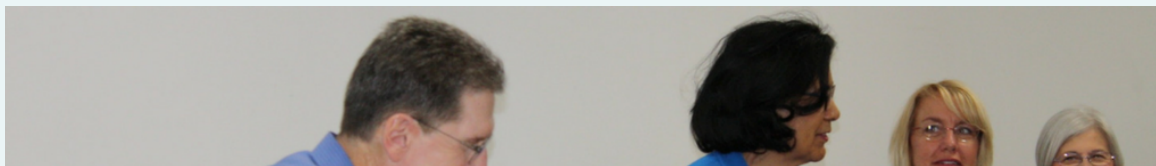
## Better together: Collaborations and Combinations event

More than 30 nonprofit leaders gathered with us last Wednesday to explore the wide range of approaches that organizations can take to work together.

Hosted by Charitable Advisors and Charitable Allies, we want to thank the six nonprofit executives ([click here to see panelists](#)) who shared collaboration/merger experiences.

### Here's a snapshot of the conversations:

- **When the right relationships are in place**, organizations of all sizes can effectively work together to the benefit of their clients and without fear of being overpowered. Ascent 121 has a contractual partnership with Community Health Network and Lutheran Child and Family Services/Lutherwood to provide a much-needed service for the constituents at the residential center.
- There are many ways that multiple nonprofits are **sharing administrative infrastructure**. The panel's examples included the more than 10 subsidiary nonprofits of Mental Health America of Indiana supporting mental health issues, nine nonprofits that merged into one organization at Fountain for Youth (Columbus), and more than 20 client organizations of the Indiana Youth Services Association that have outsourced most accounting and HR functions.
- **Long-time institutions can reinvent themselves and prosper**. Ruth Lilly Health Education Center and Hooks Discovery Center joined with Marian University and continue to deliver services to schools through outreach programs.
- **Organizations can invest significant time and resources and choose not to move forward**. Combinations that might seem the easiest and most obvious can pose as many challenges as other mergers. Habitat for Humanity of Greater Indianapolis and surrounding county affiliates was one example shared.





### Other insights:

- Many nonprofits collaborate around programs by referring clients but hesitate to risk loss of control or share funding in deeper working relationships. In a 2014 survey, 55 percent of foundations wanted to see more mergers and 76 percent wanted to see more shared support functions. [For full report](#)
- When there is a leadership transition, it is a common time to explore merger options.
- While 78 percent of nonprofit CEO said their nonprofit engage in joint programming, both nonprofit and foundation leaders see more opportunity for nonprofits to engage more deeply in working relationships to build program capacity and impact, leadership capacity and financial sustainability.



## How is Charitable Advisors working with nonprofits?

### Do you have an upcoming Executive Director/CEO Transition?

Nonprofit CEO/ED searches have seen a surge in 2017 and 2018. After supporting 12 searches in 2017, we have already completed five searches this year with four searches in process. If you are anticipating a December 2018 retirement or departure, it is time to begin preparation.

### Succession Planning Training

Succession and Contingency Planning is gaining more and more visibility and priority from funders. In the past two months, Bryan has conducted multi-part training sessions for two community foundations in northern Indiana to equip more than 70 nonprofit leaders to prepare their organizations for the future.

Be proactive. What has your organization done to prepare for an unexpected illness, absence or key staff transition?

### 2018 Central Indiana Nonprofit Salary Survey is closed

Thank you to 255 nonprofit organizations that participated in this year's nonprofit salary survey. Participating organizations will receive the survey in July in time for 2019 budgeting. The report will be posted on Charitable Advisor's website in September for the general public.

### Are you reaching your fund-raising goals?

Last month we shared that T.J. McGovern is now working with the Charitable Advisors team to provide fund-raising solutions for our clients and community nonprofits. We are excited to have T.J.'s expertise to support current CEOs and their development staff, in addition to assisting new Executive Directors/CEOs and Development Directors to increase the effectiveness of their fund-raising efforts.

One of T.J.'s unique services is a fund-development report card that quickly evaluates your efforts and helps prioritize opportunities to improve. Contact him to learn more [tj@mcgimpact.com](mailto:tj@mcgimpact.com)

Let us know how we can support you and your organization.

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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