About Me
• 9-9:15: Introductions
• 9:15-9:45 Main Roles of a Board Member
  1. Mission Keeper
  2. Fiduciary Responsibility
  3. Planning Ahead
  4. Connection to the Community: ambassador, advocate, activist (fundraising)
• 9:45-10:10: Board Policies and Procedures & Ethics
• 10:10-10:30: Q&A
Sustainability vs. Resilience

I'm not afraid of storms,
for I'm learning how to sail my ship.

— Louisa May Alcott

Your Future, Our Focus
“Anyone can hold the helm when the sea is calm.”

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US Nonprofit Organizations: IRS Classifications

501(c)(3) Public Charities
998,758 organizations

- Large orgs
  - Form 990 filers
  - Hospitals
  - Colleges
  - Human services
  - Museums
  - Community foundations
  - Many others

- Small orgs
  - Below revenue/asset threshold to file 990
  - Community theaters
  - Neighborhood orgs
  - New organizations
  - Many others

- Congregations
  - Registration optional

501(c)(4) Social Welfare Orgs
111,561 organizations

- Civic associations
- Service clubs
- Advocacy orgs
- HMOs & managed care plans
- Many others

501(c)(3) Private Foundations
118,368 organizations

- Grantmaking foundations
  - Family, corporate, & individual foundations

- Operating foundations

501(c)(6) Business Leagues
72,582 organizations

- Chambers of commerce
- Business associations
- Boards of trade
- Professional sports leagues

501(c)(7) Social & Recreation Clubs
57,030 organizations

- Country & golf clubs
- Fraternities & sororities
- Athletic clubs
- Alumni clubs
- Many others

501(c)(8) Fraternal Beneficiary Societies & Associations
58,166 organizations

- Fraternal organizations
- Lodges
- Benefit providers
- Insurers
- Many others

501(c)(5) Agricultural, Horticultural & Labor Orgs
56,269 organizations

- Farm bureaus
- Labor unions
- Labor organizations
- Many others

Your Future, Our Focus
6 Key Competencies of Strong Boards

- **Contextual:** organizations values, commitments, and purposes in its work
- **Educational:** all its members are well informed about the organization, its social environment, and its internal roles and processes
- **Interpersonal:** actively attends to the development of the group, nurturing the relationships among its members, creating a sense of inclusiveness among them, setting goals for the group itself, and grooming members for positions of leadership
- **Analytic:** makes use of a variety of problem-analysis methods to understand the challenges the organization faces and to synthesize creative conclusions
- **Political:** develops and maintains clear communications with the organization’s constituencies
- **Strategic:** actively engages in visioning and preparing for the future of the organization
Challenges to Board Governance?

- Lack of understanding of the role of board members
- Difficult to recruit board members
- Matching board members interests and motivations with needs of the organization
- Ineffective board processes
- Lack of long term organizational planning
- Relationship to executive director/key staff
- Apathy towards status quo
Financial Literacy in the Nonprofit Sector

• “It has become increasingly important for nonprofit organizations to have the knowledge and skills that are necessary to apply and use this data for decision-making and benchmarking”. P. 5

• Study of responses from more than 500 nonprofit professionals
• 76% consider themselves knowledgeable in financial principles and concepts
• 17% novices in terms of their level of financial knowledge
• 6.9% consider themselves experts
• Knowledge of:
  – Cash flow projections 75%
  – Reporting internal policies to employees 74%
  – Debt restructuring 46%
  – Collaboration or merger analysis 41%
• Only 39.3% had a Board audit committee
• 37% had a goal of maintaining a targeted level of cash reserves and financial flexibility
• 23.7% reported that breaking even financially was a primary financial objective
• Nearly 49% had less than three months worth of operating expenses available
• 26.4% had 4-6 months
Nonprofit Sustainability = “the double bottom line”

Financial EFFICIENCY

Money
• Are we managing our resources for maximum efficiency?
• Are we getting enough financial return/profitability to continue?
• How do we measure this?

Program EFFECTIVENESS

Mission
• Are we meeting our program goals and objectives (inputs, outputs, outcomes)?
• Are we having an impact on our mission?
• How do we measure this?
• Governance: is the set of responsibilities that ensures accountability, achieves legitimacy with all key internal and external stakeholders and establishes the mission of the organization.
# Nonprofit Governance

## Diagram

```
   Strategic
      |
  Tactical
      |
Operational
```

## Internal vs. External

<table>
<thead>
<tr>
<th>Internal</th>
<th>External</th>
</tr>
</thead>
<tbody>
<tr>
<td>Board</td>
<td>Gov't (decision makers)</td>
</tr>
<tr>
<td>CEO</td>
<td>Media</td>
</tr>
<tr>
<td></td>
<td>Other funders/NPs</td>
</tr>
<tr>
<td>Program dir.</td>
<td>Gov't (staff)</td>
</tr>
<tr>
<td>Program officers</td>
<td>Other funders/NPs</td>
</tr>
<tr>
<td>Program officers</td>
<td>Grantees</td>
</tr>
<tr>
<td>Evaluation staff</td>
<td>Academics</td>
</tr>
</tbody>
</table>
```
## Staff vs. Board

### Executive Director = Management
- Support organizational culture
- Set annual goals and objectives
- Strategic planning: input and implementation
- Performance management monitoring and reporting
- Fiscal management: monitoring and reporting
- Board policy compliance
- Legal compliance
- Volunteer management
- Hire, supervise and evaluate staff who reflect the community you serve

### Board = Governance
- Create and manage the mission and vision for the organization
- Organizational values
- Strategic planning: input, adoption and implementation
- Investment decisions: infrastructure, technology, etc.
- Performance management goals
- Fiscal direction and oversight: long term, policy
- Legal oversight
- Hire and evaluate executive director
- Have a balanced and representative board to reflect the community you serve
Types of Volunteer Opportunities

- **Board members or administrative volunteers**: community members, strategic thinking
- **Fundraising volunteers**: grant writing, special events, in the community
- **General support**: in the background, responding to organization needs
- **Direct service volunteers**: work directly with the clients or members of the organization
Volunteer Participation by Gender and Age

Source: Hart Survey of Volunteers (N=2,316)

<table>
<thead>
<tr>
<th>Age</th>
<th>Men</th>
<th>Women</th>
</tr>
</thead>
<tbody>
<tr>
<td>Under 18</td>
<td>11%</td>
<td>89%</td>
</tr>
<tr>
<td>18-29</td>
<td>11%</td>
<td>89%</td>
</tr>
<tr>
<td>30-39</td>
<td>13%</td>
<td>87%</td>
</tr>
<tr>
<td>40-54</td>
<td>20%</td>
<td>80%</td>
</tr>
<tr>
<td>55+</td>
<td>34%</td>
<td>66%</td>
</tr>
</tbody>
</table>
Important Factors in a Volunteer Experience

% users rating each as very important/important

Volunteers Under 55

Volunteers 55+

- Cause I care about
- Understand expectations
- Interesting/challenging
- I can make a difference
- Fits my schedule
- Uses my skills/experience
- Nearby/convenient
- Intellectually stimulating
- Has orientation/training
- Matches my career skills
- Volunteer with friends

Source: Hart Survey of Volunteers (N=2,316)
• What are the current strengths of your board?
Weaknesses

• What are the weaknesses related to your board?
Board of Trustees/Directors

An independent board...
- Determines the mission
- Establishes policies
- Develops program and long term planning
- Sets budgets
- Provide direct financial contributions
- Select, evaluate and terminate the CEO/ED
- Develop links to the community
Board Roles

- attend meetings of the board and board committees on which you serve
- have general knowledge and understanding of how the organization is functioning, and you must have particular knowledge and understanding about the purpose of the organization and the specific responsibilities assigned to you.
- Absence from meetings and inactivity do not excuse you from legal responsibility.
Who is responsible for managing risk?

• The Board is responsible for understanding:
  – the rules in the organization
  – The risk management process
  – How the organizational policies are communicated and implemented
  – Issues such as law, litigation, compliance, ethics and disclosure
# By the Numbers

A statistical look at charity boards

<table>
<thead>
<tr>
<th>Number</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>7.4</td>
<td>Average number of board meetings a year</td>
</tr>
<tr>
<td>3.4</td>
<td>Average number of hours for each board meeting</td>
</tr>
<tr>
<td>3</td>
<td>Average length, in years, of a board member’s term</td>
</tr>
<tr>
<td>16.1</td>
<td>Number of people on an average charity’s board</td>
</tr>
<tr>
<td>3%</td>
<td>Share of nonprofits that pay board members an honorarium for their service</td>
</tr>
<tr>
<td>26%</td>
<td>Share of nonprofits that reimburse board members for travel and other meeting expenses</td>
</tr>
<tr>
<td>70%</td>
<td>Share of nonprofits that require a personal contribution from board members</td>
</tr>
<tr>
<td>86%</td>
<td>Share of board members over the age of 40</td>
</tr>
<tr>
<td>2</td>
<td>Average number of charity boards on which board members serve</td>
</tr>
</tbody>
</table>

Source: BoardSource Nonprofit Governance Index 2010
Managing Organizational Risk

- Risk areas with Directors and Officers Liability Insurance doesn’t protect you from everything because you still need to:
  - Exercise due diligence
  - Enforce term limits
  - Properly record board actions in minutes
  - Give comprehensive new board member orientation
  - Require or enforce board member performance expectations
  - Provide board members with the requisite data and background information for informed decisions
Board Assessment

• Assessment is the most effective way to ensure your board members understand their duties and utilize effective good governance practices.
• Assessments move your board and board leaders to the next level of performance.
• Board Source resources
• Worksheet: Board Self-Assessment
What makes a leader?

• Open, honest and forthright in their responses to crises
• Reflect the values that most stakeholders admire
• Communicate lessons learned
What type of fundraiser are you?

- Hand out
- https://askingmatters.com
- 3 minute asking style quiz
Fundraising: An Art AND a Science

- **Art**: listening, feeling connected to the donors, empathy, sincerity, thanking donors, respecting donors

- **Science**: donor prospect, analyzing who to approach (prospect research), keeping careful notes and records (database management), donor recognition
• William Aramony was President of United Way of American from 1970 to 1992
• He was jailed in 1995 for defrauding the organization of more than $1 million
• Convicted in 1995 on 23 counts of felony charges, including conspiracy, fraud and filing false tax returns
Nonprofit head found guilty in fraud trial with ties to politicians

Frenesha Myles, photographed Aug. 4, 2016, at the Downtown U.S. Courthouse in Chicago, is on trial after being accused of using state grant money for a personal spending spree. (Pat Velezquez/Chicago Tribune)

By Jason Meisner · Contact Reporter
Chicago Tribune
MAY 23, 2017, 8:44 PM
Little of nonprofit’s money goes to charity

Red Cross responds to report about 2010 quake building only six homes in Haiti after

By Michael Martinez, CNN

Payments to charity Executive Director Mary Ann Grossett and Vice President Charomi Smith, sisters of President Rhonda McCullough, identified as “investment management fees” to a firm listed as “IOTA.” Bernie Mac Foundation Treasurer Edward Williams is president of IOTA 3759 Investments Ltd., which is based at the same office as the charity.

Grants to Foundation for Sarcoidosis Research and the University of Illinois Hospital & Health Sciences System. With Edward A. Associates Ltd., which is based at the same office as the charity and is listed as its tax preparer.

SOURCE: Illinois secretary of state, Illinois attorney general, tax filings

Your Future, Our Focus
Wounded Warrior Project Spends Lavishly on Itself, Insiders Say

By DAVE PHILIPPS  JAN. 27, 2016
Why Confidence in the Nonprofit Sector Has Decreased

<table>
<thead>
<tr>
<th>Factor</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Scandals in the sector</td>
<td>73%</td>
</tr>
<tr>
<td>People don’t understand the complexity of the sector</td>
<td>48%</td>
</tr>
<tr>
<td>Nonprofit executives’ salaries</td>
<td>45%</td>
</tr>
<tr>
<td>Low program ratios</td>
<td>12%</td>
</tr>
<tr>
<td>Its much easier to get information on nonprofits today</td>
<td>9%</td>
</tr>
</tbody>
</table>

Source: Coffman (2006)
Where is the bar?

Level of Compliance

High

People First

Environment Impact

Financial Transparency

VALUES

ETHICS

Low

Don’t steal $

Ethics Test

Narrow Application

Broad Application

Your Future, Our Focus
Definition of Ethics

Ethics are applying values to a process, rather than a rigid determination of right and wrong.
Ethics as a Process

• Ethics is a process by which a decision is made and that process not only uncovers values but also allows you to prioritize them.

• Distinguish between ethical and legal.
## Stages of Moral Reasoning

<table>
<thead>
<tr>
<th>Stage</th>
<th>What’s Right?</th>
<th>Reason to be good?</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Stage 0:</strong></td>
<td><em>Egocentric (0-4)</em></td>
<td>I should get my own way</td>
</tr>
<tr>
<td></td>
<td><em>What’s Right?</em></td>
<td><em>Reason to be good?</em> To get rewards and avoid punishments</td>
</tr>
<tr>
<td><strong>Stage 1:</strong></td>
<td><em>Unquestioned Obedience (4-6)</em></td>
<td>I should do what I’m told.</td>
</tr>
<tr>
<td></td>
<td><em>What’s Right?</em></td>
<td><em>Reason to be good?</em> To stay out of trouble.</td>
</tr>
<tr>
<td><strong>Stage 2:</strong></td>
<td><em>What’s in it for me? (6-8)</em></td>
<td>I should look out for myself but be fair to those who are fair to me.</td>
</tr>
<tr>
<td></td>
<td><em>What’s Right?</em></td>
<td><em>Reason to be good?</em> Self-interest: What’s in it for me?</td>
</tr>
<tr>
<td><strong>Stage 3:</strong></td>
<td><em>Intrapersonal Conformity (9-15)</em></td>
<td>I should be a nice person and live up to the expectations of people I know and care about.</td>
</tr>
<tr>
<td></td>
<td><em>What’s Right?</em></td>
<td><em>Reason to be good?</em> So others will think well of me (social approval) and I can think well of myself (self-esteem)</td>
</tr>
<tr>
<td><strong>Stage 4:</strong></td>
<td><em>Responsibility to the system (15-20)</em></td>
<td>I should fulfill my responsibilities to the social or value system I feel part of.</td>
</tr>
<tr>
<td></td>
<td><em>What’s Right?</em></td>
<td><em>Reason to be good?</em> To keep the system from falling apart and to maintain self-respect as somebody who meets my obligations.</td>
</tr>
<tr>
<td><strong>Stage 5:</strong></td>
<td><em>Principled Conscience (20+)</em></td>
<td>I should show the greatest possible respect for the rights and dignity of every individual person and should support a system that protects human rights.</td>
</tr>
</tbody>
</table>
Charities should generally not compensate persons for service on the board of directors except to reimburse direct expenses of such service. ... Charities may pay reasonable compensation for services provided by officers and staff. In determining reasonable compensation, a charity may wish to rely on the rebuttable presumption test of section 4958 of the Internal Revenue Code and Treasury Regulation section of 53.4958-6.

Source: IRS publication Governance and Related Topics - 501(c)(3) Organizations (2008)
Board Standards of Conduct

- **Duty of care**: board members act like any reasonable person in similar circumstances (diligent, attending meetings, understanding the issue before decisions)

- **Duty of loyalty**: act primarily in the interest of the organization not themselves

- **Duty of obedience**: act according to the law and in accordance of their mission
# Government Regulation

<table>
<thead>
<tr>
<th>Federal</th>
<th>State</th>
<th>Local</th>
</tr>
</thead>
<tbody>
<tr>
<td>• IRS determination and annual filing</td>
<td>• Statutes: income tax, sales tax, solicitation</td>
<td>• Ordinances</td>
</tr>
<tr>
<td>• Employment tax</td>
<td>• Funding requirements</td>
<td>• Property tax</td>
</tr>
<tr>
<td>• Funding requirements</td>
<td></td>
<td>• Utility charges</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Funding requirements</td>
</tr>
</tbody>
</table>
Federal Law Considerations

- IRS: charitable contribution deductions, unrelated business income tax, noncash gifts, donor advised funds
Tax-Exempt Status Benefits

• The benefits of having 501(c)(3) status include exemption from federal income tax and eligibility to receive tax-deductible charitable contributions.

• Another benefit is that some organizations may be exempt from certain employment taxes.

• An IRS determination of 501(c)(3) status is recognized and accepted for other purposes. For example: state officials may grant exemption from state income, sales, and property taxes; and the U.S. Postal Service offers reduced postal rates to certain organizations.
• IRS 990 Information Return: self-reported financial data available to the public through Guidestar.org and to researchers through the National Center for Charitable Statistics
Know your 990

- Legal name versus “doing business as”
- Very public document!
- Board review process
- Current mission statement
- Estimated volunteers
- Accuracy of all numbers from front page to schedules
- Allocation of expenses problem
**Internal Revenue Service**


- **Free ENewsletter:** The EO (exempt organizations) Update is a periodic newsletter with information for tax-exempt organizations and tax practitioners who represent them.
Legal Requirements of the Board

As a board member, you have the basic legal and policy responsibility for your not-for-profit organization. Even though you are an unpaid volunteer, you must:

1. Be active
2. Receive no material profit
3. Avoid conflicts of interest
4. Exercise judgment in overseeing the organization’s affairs
5. Comply with applicable governmental regulations
State Law Considerations
Illinois Requirements

• Initial registration with Attorney General’s office (fee)
• Need to file articles of incorporation (filed with Secretary of State) and bylaws
• Annual financial report due within six months of fiscal year, CPA opinion must accompany report if revenues exceed $300,000 (as of January 2010)
• Fees for late registration or annual report
Charitable Organization Laws

1. The Illinois Charitable Trust Act
2. Solicitation for Charity Act
3. Illinois Criminal Code
Need to Know

- State employment law
- Federal employment law
- Staff benefits
- Employment tax collection and submission
- Payroll management
- Volunteer management
- Job descriptions for staff and volunteers
- Liability for staff and volunteers
• **Reasonable Compensation**: based on size of budget, number of employees, education and training required, market area (cost of living)
Charity Gaming Law

- Morris VFW pot at $1.6 million, with the winter taking home 70%
- Game was temporarily shut down after state regulators told VFW and the city they needed a local raffle license
- No more tickets were sold but the raffle was allowed to conclude
- Winner announced: Kevin Repselsaid he bought 30 tickets, $10 for each number
The Nonprofit Accountability Climate

• Government: more regulation
• Self-regulation: accountability clubs, standards and codes within the sector and within sub sectors
• Public: call for transparency, accountability, effectiveness
• “Fuzzy” definitions of nonprofits; partnerships, contractual relationships, social entrepreneurs, quasi-public, quasinonprofits
Myths

• The larger the organization, the higher the risk for fraud or other ethical violations
• Policies prevent fraud and ethical violations
• The staff makes sure the organization is protected
When a Nonprofit Chooses to Close

• Indicate on final IRS 990
• The state must be notified that the organization plans to dissolve
• All charitable assets have to be given to another nonprofit organization (or returned to the donor if alive)
• The board has the responsibility for all finances during their tenure on the Board and in the case of dissolving that nonprofit
In Practice

- Code of ethics
- Conflict of interest policy
- Document retention policies
- Ethical fundraising practices
- Ethical leadership
- Financial transparency
- Internal controls
- Public disclosure policy

State laws may independently require nonprofits to disclose various documents to the public.

- Whistleblower protection policies
What you can do

- Know your risks
- Have a communications plan to address a crisis
- Review and update any policies concerning privacy of clients, employees etc.
- Have open and frequent discussions about ethics, what your organization stands for
- Model high ethical standards for staff, board members and staff
- Be transparent in all you do
- Admit when something goes wrong and work openly to fix it
Types of Reporting

Mandatory

External

Audited Financial Statements
IRS 990

Internal

Board Minutes

Performance

Data Reports

Voluntary

Audited Financial Statements

Strategic Plans

Website

Annual Report

Strategic Plans

Meetings

Budgets

Ads

Your Future, Our Focus
The Nonprofit Accountability Climate

- Government: more regulation
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Charity Watchdogs

- Guidestar [www.guidestar.org](http://www.guidestar.org)
- BBB Wise Giving Alliance [Standards for Charitable Accountability](http://www.betterbusiness.org/charity worthy)
- Charity Navigator [Charity Navigator Ratings](http://www.charitynavigator.org)
- Standards for Excellence Institute [Standards for Excellence: An Ethics and Accountability Code for the Nonprofit Sector](http://www.sfeinstitute.org)
Board Source

- BoardSource offers Downloadable Policy Samplers in 10 different topic areas to help you create specific policies.
- Publication Date: 2013
  - $ 13.25- Member Price
  - $ 19.50- Nonmember Price
- The Ethics and Accountability Sampler includes 46 samples on the following:
  - Mission and Vision
  - Values
  - Code of Ethics
  - Diversity Statement
  - Conflicts of Interest
  - Confidentiality
  - Whistleblower Protection
  - Record Retention and Document Destruction
CODE OF ETHICAL STANDARDS

ETHICAL STANDARDS (Adopted 1964; amended Oct 2014)
The Association of Fundraising Professionals believes that ethical behavior fosters the development and growth of fundraising professionals and the fundraising profession and enhances philanthropy and volunteerism. AFP Members recognize their responsibility to ethically generate and support ethical generation of philanthropic support. Violation of the standards may subject the member to disciplinary sanctions as provided in the AFP Ethics Enforcement Procedures. AFP members, both individual and business, agree to abide (and ensure, to the best of their ability, that all members of their staff abide) by the AFP standards.

PUBLIC TRUST, TRANSPARENCY & CONFLICTS OF INTEREST

Members shall:

1. not engage in activities that harm the members’ organizations, clients or profession or knowingly bring the profession into disrepute.
2. not engage in activities that conflict with their fiduciary, ethical and legal obligations to their organizations, clients or profession.
3. effectively disclose all potential and actual conflicts of interest; such disclosure does not preclude or imply ethical impropriety.
4. not exploit any relationship with a donor, prospect, volunteer, client or employee for the benefits of the members or the members’ organizations.
5. comply with all applicable local, state, provincial and federal civil and criminal laws.
6. recognize their individual boundaries of professional competence.
7. present and supply products and/or services honestly and without misrepresentation.
8. establish the nature and purpose of any contractual relationship at the outset and be responsive and available to parties before, during and after any sale of materials and/or services.
9. never knowingly infringe the intellectual property rights of other parties.
10. protect the confidentiality of all privileged information relating to the provider/client relationships.
11. never disparage competitors untruthfully.

SOLICITATION & STEWARDSHIP OF PHILANTHROPIC FUNDS

Members shall:

12. ensure that all solicitation and communication materials are accurate and correctly reflect their organization’s mission and use of solicited funds.
13. ensure that donors receive informed, accurate and ethical advice about the value and tax implications of contributions.
14. ensure that contributions are used in accordance with donors’ intentions.
15. ensure proper stewardship of all revenue sources, including timely reports on the use and management of such funds.
16. obtain explicit consent by donors before altering the conditions of financial transactions.

TREATMENT OF CONFIDENTIAL & PROPRIETARY INFORMATION

Members shall:

17. not disclose privileged or confidential information to unauthorized parties.
18. adhere to the principle that all donor and prospect information created by, or on behalf of, an organization or a client is the property of that organization or client.
19. give donors and clients the opportunity to have their names removed from lists that are sold to, rented to or exchanged with other organizations.
20. when stating fundraising results, use accurate and consistent accounting methods that conform to the relevant guidelines adopted by the appropriate authority.

COMPENSATION, BONUSES & FINDER’S FEES

Members shall:

21. not accept compensation or enter into a contract that is based on a percentage of contributions; nor shall members accept finder’s fees or contingent fees.
22. be permitted to accept performance-based compensation, such as bonuses, only if such bonuses are in accord with prevailing practices within the members’ own organizations and are not based on a percentage of contributions.
23. not offer or accept payments or special considerations for the purpose of influencing the selection of products or services.
24. not pay finder’s fees, commissions or percentage compensation based on contributions.
25. meet the legal requirements for the disbursement of funds if they receive funds on behalf of a donor or client.
The Donor Bill of Rights

- To be informed of the mission and how funds will be used
- To be informed of who the board is and expect the board to be responsible
- To have access to financial statements
- Assurance that gifts are used for the purposes for which they are given
- To receive appropriate acknowledgement and recognition
• To be assured of confidentiality and respect
• To expect professional relationships
• To be informed whether solicitors are volunteers, staff or hired solicitors
• To have the opportunity of anonymity and to be deleted from “lists”
• Ability to ask questions and receive prompt and truthful answers
Ethical Fundraising and Financial Accountability Code

Elements of the Code:

- Donor’s rights
- Fundraising practices
- Financial accountability
My Book Recommendations

- **Impact & Excellence**
  - Sheri Chanev Jones
  - Foreword by Barbara E. Rile
  - Data-Driven Strategies for Aligning Mission, Culture, and Performance in Nonprofit and Government Organizations

- **Joan Garry's Guide to Nonprofit Leadership**
  - Joan Garry
  - Wiley

- **Building Nonprofit Capacity**
  - John Brothers, Anne Sherman
  - A Guide to Managing Change Through Organizational Lifecycles

- **Donor Centered Fundraising**
  - Penelope Burk
  - How to hold on to your donors and raise much more money

- **The End of Fundraising**
  - Jason Saul
  - Raise more money by selling your impact

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Your Future, Our Focus
Podcast Recommendations

• Doing Good Podcast
• Social Good Instigators
• Nonprofits are Messy: Joan Garry
• Nonprofit Hub Radio
Upcoming Workshops

• Mission Drift and Strategic Planning for Nonprofits: October 10
• Fundraising Strategies for Nonprofit Staff and Board Members: November 28
Alicia Schatteman
Associate Professor
Center for Nonprofit and NGO Studies
Department of Public Administration
Northern Illinois University
DeKalb, Illinois
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aschatteman@niu.edu

www.nonprofitscholar.com

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