

THE BONNER CONSULTING QUARTERLY February 2014

Dear Leslie,

We are proud to announce the new name of our consulting collaboration, **BonnerSphar Consulting** and our purpose, **Making Nonprofits Stronger**.

During the last year we partnered on numerous engagements aimed at strengthening our nonprofit clients. This included the **development of strategic plans** for FamilyLinks, NAMI of Southwestern PA, and the FracTracker Alliance. We continue to work with Attack Theatre, CONNECT and the PA School Board Association on strategic plans. And we are working with Sojourner House MOMS on the **integration and transition** of two newly acquired housing programs. The services we provide, resource links, and our blog can be found on our website at www.bonnarsphar.com. We also worked independently with many clients.

Kate's independent work included::

- Completing a **business plan** for the Penn State Center, strategic plans for Braddock Carnegie Library and Melting Pot Ministries, and an **operational plan** for Friends of the Riverfront.
- Developing an expanded **collaborative model** for the Environmental Finance Collaborative, and facilitating the development of Memorandums of Understanding for both the Reuse Technology Collaborative and the Collaborative for Mental Health Advocacy.
- Exploring potential **revenue diversification** opportunities and conducting **market research** for two area organizations.
- Conducting **financial systems assessments** for several organizations, including the Homewood Renaissance Association.
- **Facilitating** board and staff retreats for the Pittsburgh Downtown Partnership and Tree Pittsburgh among others.

Leslie's independent work included:

IN THIS ISSUE:

Announcing our New Name/Website

Does Your Board Understand Financial Oversight?

Developing Nonprofit Executives Updated & Expanded

- Facilitating 15 nonprofit CEOs in a **succession planning** cohort to help prepare their organizations, boards and teams for a leadership transition. This cohort, funded by The Forbes Funds, is continuing in 2014.
- Creating a strategic plan with PA Certified Organics and helping the MHA of Butler County identify and contract with a management services organization.
- Conducting **Board Assessments and Board Education Workshops** for Dickinson Mental Health and Every Child among others.
- Providing **Leadership Coaching** services to a number of organizations and individuals and conducted a series of **Management training**/action learning workshops for LIFE Pittsburgh.
- Facilitating **staff and team workshops/retreats** for Center for Victims, Senior LIFE, The Neighborhood Academy and 5 other organizations.
- Presenting at **6 nonprofit conferences/workshops** on various topics including Succession Planning and Board Development. Leslie also created and presented a Webinar on Leadership Development for Wiley Publishing.

Below are two articles that were informed by our work. We encourage you to share them with your Boards and staff. We wish you all a prosperous 2014 and look forward to working with you.

Does Your Board Understand Financial Oversight?

Kate Sphar

Leslie and I love our jobs. We work with a lot of really fantastic people at organizations that are doing meaningful work in their communities. Over time, we have seen nonprofit leaders become smarter and more savvy about how they manage. In the ten years I have been a consultant to nonprofits, I have seen the level of financial acumen among my clients significantly increase.

Of course, that doesn't mean there isn't room for improvement. Perhaps it is because of the increased sophistication of nonprofit managers that we see Boards "checking out" financially. Even in this day and age of increased scrutiny on nonprofits, we still encounter Board members who aren't aware of their responsibility regarding the agency's financial health and solvency.

[READ MORE](#)

Developing Nonprofit Executives - Updated & Expanded The Skills, Experiences & Attributes Your Next Leader Needs

Last September I was asked by publisher Wiley: Jossey Bass to present a Webinar based on a study of [Nonprofit Leadership Development](#) that I had authored while at Dewey & Kaye. In the 6 years since the study was published I have had the opportunity to work with many organizations on Succession Planning and Leadership Development, so I was grateful for the opportunity to update and expand on my previous work.

In the original study, we focused heavily on the competencies or attributes needed to lead a nonprofit. Two other areas, not focused on in the original study, play an equal role in an Executive's success - functional skills and types of experiences. As we originally discovered from our discussions with leading Executives, most didn't have all of these needed qualities when they took the position. Instead, they learned on the job through trial and error. But as the nonprofit sector faces an unprecedented wave of retirements, we have the opportunity to formally develop Executives in advance with the skills, experiences, and leadership attributes they will need to lead tomorrow's organizations.

Let's start with the process model for developing Nonprofit Executives...

[READ MORE](#)

Need a Speaker or Facilitator?

Planning a conference or seeking a speaker? We'd love to submit a proposal. We can customize topics such as Creating an Executable Strategic Plan, Succession Planning, Nonprofit Leadership Development, Best Practices In Board Governance, Nonprofit Financials Simplified for Boards, Change & Transition Tools and Tips, or Building and Engaging Nonprofit Boards

Perhaps you just need a facilitator for a Board or Staff Retreat? Our services are available for large or small group meetings where it may be beneficial to have an objective professional guide a group through their agenda, ensure active participation, and work through challenging topics.

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