

This newsletter features a “summer reading list” of some longer reports. There is something for everyone on this summer reading list. Whether you are interested in board leadership, finance, fundraising or technology you’ll find something of interest to you on this list.

I have also posted a blog entry about this list and please do stop by and post replies to my post and let us all know what you think about any of the reports you check out.

Enjoy,
Marion

Ten Essential Responsibilities of Foundation Board Chairs

Free report published by Boardsource

http://www.boardsource.org/dl.asp?document_id=630

This white paper produced cooperatively with the Council on Michigan Foundations covers the full range of **Board Chair** responsibilities many of which are appropriate for all nonprofit boards and some that are foundation board specific. The report discusses such basics as having a passion for the mission, planning for the future, financial oversight and legal compliance, facilitating meetings, using committees, building a strong and engaged board, communicating with the community, administrative oversight and assessing performance. All of the basic good advice in these sections is also pertinent for all nonprofit board chairs.

There is also a section entitled “Guide to Grantmaking Strategy with a highlighted section on fundraising for community foundation board chairs. The appendix also has a list of questions frequently asked of foundation board chairs and advice on answering them.

Overall this white paper is an excellent primer for any board chair, and particularly for foundation board chairs. At a brief 21 pages it is worth a full read.

The Appropriate Role of the IRS with Respect to Tax-Exempt Organization Good Governance Issues

Issued by the Advisory Committee on Tax Exempt and Government Entities (ACT)

http://www.irs.gov/pub/irs-tege/tege_act_rpt7.pdf

ACT has a formal advisory role to the IRS and they have weighed in on the new 990 in a 112 page report advising and cautioning the IRS in use of its new 990. ACT acknowledges the IRS’s legitimate interest in governance issues as they relate to compliance with the law and applauds the transparent and open process used to develop the new form. But it expressed concern and urged the IRS to approach governance with caution. The report acknowledges that governance is an appropriate issue for the IRS to address and outlines what it thinks that role

should be. Extensive references are cited. This is a must read for those of you with finance responsibilities – board or staff. See my blogpost on this report at: <http://marionconwaynonprofitconsultant.blogspot.com/2008/06/advisory-board-weighs-in-on-new-990.html>

Giving USA 2008

Released by Giving USA Foundation.

<http://givingusa.org>

Giving USA has announced availability of this year's annual report and associated presentation materials. The report is based on a survey of 366 charities conducted by the Center on Philanthropy at Indiana University. It is considered the authoritative resource on this subject. Since it has been conducted annually in a consistent manner it also provides excellent data about trends in giving. There are various prices for purchasing different components of the report and it is pricey, but for some of you it is a must have for this definitive source data. See more details at my blogpost:

<http://marionconwaynonprofitconsultant.blogspot.com/2008/06/giving-usa-2008-highlights-are-now.html>

Perfecting Your Page: Can donation page optimization boost online giving?

Produced by Donor Digital (DD) in partnership with Amnesty International

http://www.fundraising123.org/files/donordigital_donation_page_optimization_research.pdf

This group teamed up to test a series of variables associated with online fundraising. The 11 page report provides detailed feedback on the results that can be used by all nonprofits. Some variables tested include size and color of donate button, polite appeal copy versus forceful call to action, and eliminating request for title. The results are surprising. This is worthwhile reading for those of you with fundraising, marketing, communication and technology responsibilities.

Philanthropy Journal Professional Development Series 2008

<http://www.philanthropyjournal.com/resources/special-reports/professional-development/professional-development-2008>

Philanthropy Journal has published a three part article in its Professional Development series with articles on these topics:

- Fundraising: Basics, training and mentoring
- Leadership: The art of listening and explaining
- Management: Understanding the nuts and bolts

See my blog post using "The Art of Listening and Explaining" article as a base.

<http://marionconwaynonprofitconsultant.blogspot.com/2008/06/visionary-leadership-and-critical-skill.html>