One thing we’re big on here is data analytics,” said Eric Dill, senior vice president, human resources, at American Arbitration Association (AAA). Just don’t call it “Moneyball” for nonprofits. “We may have great ideas but we need to sell that to a wide group of individuals,” he said. Senior executives and leadership have a global view while finance executives focus on whether it demonstrates actual cost savings. “They can analyze data all they want; it’s the actionable side of it,” Dill said.

The Alzheimer’s Association headquartered in Chicago finished No. 24 in the overall ranking and No. 2 in the large organization category.

CEO Turnover At UWs Hits More Than 100
By Mark Hrywna

More than 100 affiliates of United Way have new chief executive officers (CEO) in place since the start of 2018. Considering that there are more than 1,100 affiliates in the United States, that might not sound like a lot but more than one-third of the departures are the result of retirements that have already taken effect or have been announced.

Whether it’s a canary in the coal mine that Baby Boomers are starting to leave the industry remains to be seen but a compilation of media reports and press releases by The NonProfit Times estimates that 121 CEO positions at United Ways of all sizes have turned over since the start of 2018 or will this year. About half of the largest affiliates by fundraising in 2018 have seen their CEOs step down since the start of last year.

United Way Worldwide (UWW) officials said the organizations doesn’t track CEO turnover among affiliates. According to a spokeswoman, turnover can be estimated for 2017 and 2018 at around 12 and 13 percent. Small affiliates are sometimes one-person shops or the board and one administrator or a bookkeeper. There are almost 100 United Way affiliates run solely by boards, according to Amy Dinofrio, vice president of human resources at UWW, making it difficult to track turnover.

According to the “2019 Nonprofit Organizations Salary and Benefits Report” by The NonProfit Times and Bluewater Nonprofit Solutions, the United Way page 14
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organizations returned to the list after a few years off, including this year’s top-ranked nonprofit, NOWCC, Inc. The National Older Worker Career Center (NOWCC) also earned the No. 1 ranking when it last participated, in 2014 and 2015.

Someone at another association was reading the April 2014 issue of The NonProfit Times, saw that NOWCC was among the Best Nonprofits and started applying for jobs there, according to German “Cito” Vanegas, president and CEO. “We didn’t have anything that matched her skills set” at the time, Vanegas said, but she ended up joining the Arlington, Va.-based organization by 2016.

The 2019 Best Nonprofits to Work For report was dominated by small organizations (15 to 49 employees) and medium nonprofits (50 to 249 employees). Eighteen small organizations made the top 50, including No. 1 overall and five of the top 10. Medium organizations accounted for more than half of the list, at 27, including 11 of the top 20.

The top 10 key drivers identified in the survey were:
• I feel I am valued in this organization;
• Most days, I feel I have made progress at work;
• I have confidence in the leadership of this organization;
• I like the type of work that I do;
• I can trust what this organization -- research is in our backbone -- we follow through on that,” she said.
• We identified some metrics for our selves to monitor on a regular basis: where are we, are we improving in certain areas,” said Mary Pittman, chief executive officer (CEO) of Oakland, Ca.

The Harrisburg, Pa.-based firm puts organizations through a battery of surveys to develop the key drivers. The Employee Benchmark Report portion of the survey includes 79 questions and statements within eight categories, with the percentage of respondents noted for answering “Agree Somewhat” or “Agree Strongly.”

Organizations that were recognized as the Best Nonprofits To Work For scored an average 90 percent positive responses overall while those that participated in the survey but did not rank among the top 50 scored 82 percent on average.

Many organizations use the survey data to gauge their own operations and garner employee feedback. Both previous times that Public Health Institute (PHI) participated in the Best Nonprofits To Work For, human resources staff used the results to make recommendations about new programs or initiatives, according to Valerie McCann Woodson, vice president of human resources.

“When we started this process, it was not with the idea that we’d win but that we’d learn about our organization and how we can continue to improve,” she said. “We are a continuous learning organization -- research is in our backbone -- we follow through on that,” she said.

“We identified some metrics for ourselves to monitor on a regular basis: where are we, are we improving in certain areas,” said Mary Pittman, chief executive officer (CEO) of Oakland, Ca.

The No. 1 organization, NOWCC, works to get all employees certified in their position through outside education. There’s a strategic work plan with clear expectations, Vanegas said, with progress for all staff and courses are paid 100 percent by NOWCC.

“Feedback from the survey gives us things to work on. It’s not just to get an award,” Pittman said. “We’re doing it because we believe if we take care of our employees first, it allows us to do our work, and to be a great place to work,” she said.

PHI has always had strong benefits and employee appreciation that, Woodson said, but some tweaks came out of the survey results as they continue to improve communications and make these offerings around professional development.

“As a public health, health-driven organization, we do everything we can to try to help our employees stay healthy and focus on prevention and wellness,” Pittman said.

PHI covers 100 percent of employee premiums for medical and dental insurance but Pittman stressed it goes beyond medical care. That’s why it’s called Wellness360. The organization invested $500 in wellness rooms at each of its four major offices. Employees wanted to have a place to go where they can take a moment for themselves. The room includes a sofa, artwork, yoga mat, refrigerator and fountain. There’s also a stress reducer kit, which includes such things as sketch books or a stress ball that employees can bring back to their desk.

Since sitting is considered the new smoking when it comes to heart disease, workplaces have jumped on the trend of standing desks for employees. PHI piloted a standing desk program almost two years ago before implementing it...
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last year. “It’s gone over well,” Dill said, adding that he was skeptical at first because of some “low cubicle environments” that might disrupt workplace neighbors. “If anything, it’s helped to create an even greater sense of community,” he said.

“The issue we have is if we can get our hands on one. It’s an item that has to be budgeted,” Dill said.

In addition to physical well-being of employees, Best Nonprofits educate staff to keep financial well-being top of mind. “We believe that having good benefits and a strong salary is important but also supporting people in their financial literacy and well-being,” Pittman said. PHI has implemented a three-part retirement education series around financial wellness and free financial counseling. “People who are near retirement and those not close but curious have taken advantage,” she said.

Pittman said the real proof is that PHI provides 10 percent of an employee’s salary toward a 403(b) retirement plan as a standard benefit for all employees, who become eligible after six months with the organization.

There is no vesting requirement nor a requirement for employees to contribute but through education and communications, PHI encourages contributions. That’s paid off as 74 percent of eligible employees make voluntary contributions to their plans, according to Woodson.

Staff members have contributed $17.7 million while PHI has contributed $22.3 million during the past five years. “We see that as a way to get people to take advantage of their generous benefits and leverage for the future,” Pittman said.

PHI sponsored a three-part seminar series last summer, “Transition to Retirement,” and offers access to its #403(b) administrator and account executive at all locations several times a year, and by appointment.

For a nonprofit, finances can fluctuate based on the economy, philanthropy or government contracts, Pittman said, but PHI has established those offerings as a priority. “What we have to do is put that as a baseline. The times would have to get really hard to cut those,” she said.

“Employees are our number one asset, we wouldn’t be able to do the work we do without incredible staff. We want to make sure we’re taking care of them as best we can,” Pittman said.

Financial education workshops, seminars or classes were a difference-maker among large nonprofits. Every large organization that made the Best Nonprofits list offered such programs compared with only 71 percent of large organizations that did not make the list. Overall, the percentage of nonprofits offering the programs was more even, about 55 percent, and also closer among other size categories.

Human resources was a “major priority” of India Johnson when she became CEO at AAA in 2013, according to Dill. A lot of organizational behaviors and initiatives were modeled around various best places to work studies, he said.

AAA made a big push around its retirement plan starting in 2017. The organization had a voluntary participation rate of less than 50 percent in its retirement plan in 2016. Senior leadership and the board identified that as an area for improvement.

After a concerted effort, AAA was able to boost that to 89 percent. There were periodic reminders to staff and even targeted mailings to individuals’ homes where perhaps a spouse or family member might see it. “Sometimes there’s a lot of noise at work, maybe we’d get their attention outside of work, that’s helpful,” Dill said. The average voluntary contribution by an employee was less than 4 percent but has since increased to 6.5 percent, he said.

The employer match has grown too, increasing just this year. AAA would match at 4 percent if an employee contributed 5 percent; now if an employee contributes 6 percent, it will be matched at 5 percent. AAA also started making discretionary contributions of 3 to 4 percent a few years ago. It’s a commitment by the nonprofit to enhance retirement savings for staff, Dill said. The employer match several common traits emerge among the 50 organizations in this year’s the Best Nonprofits To Work For. Among the eight categories of questions and statements in the Employee Benchmarks Report, Best Nonprofits scored at least 10 percentage points higher on positive responses in three of them:

• Leadership and Planning, 90 percent to 79 percent;
• Culture and Communications, 89 percent to 78 percent; and,
• Training, Development and Resources, 85 percent to 75 percent.

Leadership and Planning was more even, about 55 percent but through education and communication a requirement for employees to contribute.

That’s paid off as 74 percent of eligible employees to contribute 5 percent, now if an employee contributes 6 percent, it will be matched at 5 percent. AAA also started making discretionary contributions of 3 to 4 percent a few years ago. It’s a commitment by the nonprofit to enhance retirement savings for staff, Dill said. The employer match was more pronounced among small organizations, where Best Nonprofits scored 95 percent to 78 percent of those that did not make the list.

The category of Overall Engagement saw the highest percentage for Best Nonprofits, at 92 percent, compared with 86 percent for those not ranked.

Best Nonprofits rarely scored less than 80 percent on any one of the 79 questions.

On specific questions and statements in the report, “I feel physically safe in my work environment” scored the highest percentage of positive responses of any question, at 97 percent, followed by:

• “I am willing to give extra effort to help this organization succeed” – 96 percent;
• “My physical working conditions are good” – 96 percent;
• “I like the type of work that I do” – 96 percent;
• “I like the people I work with at this organization” – 95 percent; and,
• “I understand the importance of my role in this organization” – 95 percent.

The biggest disparity within the survey, between those selected as Best Nonprofits and those that did not make the list, was on the statement, “Staffing levels are adequate to provide quality products/services.” Overall, the 50 Best Nonprofits scored an average 80 percent positive response while employers not on the list scored only 58 percent – a difference of 22 percentage points. It was the lowest score overall for nonprofits not on the list, and significantly less than the average 76 percent within the category, culture and communications.

The imbalance was pervasive across all sizes of organizations when it came to adequate staffing levels. At small organizations, 82 percent of Best Nonprofits had a positive response, compared with just 59 percent at other organizations. Among medium organizations, Best Nonprofits, had 81 percent positive responses versus 63 percent at other organizations.

“My pay is fair for the work I perform,” scored 79 percent – the lowest individual question for Best Nonprofits, but still 16 percentage points greater than 63 percent scored by those not on the list. That was the second-largest gap among positive responses.

AAA determined through an annual benefits analysis that only about 40 percent of staff, including members of their household, were getting their annual physical.

Its Healthy Directions program provides a $10 per month discount on employee portion of healthcare fees, which could cost the organization upward of $60,000 annually. To encourage staff to see their doctors regularly, AAA introduced a quarterly raffle for a $1,000 gift card for employees who get their annual physical. About 83 percent of staff now get their annual physical.

The idea is that frequent and regular communication between doctor and patient improves the chances of catching a manageable disease or other issues at early stages, Dill said. “The cost of someone having a heart attack because they didn’t treat hypertension, that’s significa-
Mary Pittman has been chief executive officer (CEO) at Public Health Institute for about 11 years — precisely the average tenure for chief executives among large organizations recognized in the 2019 Best Nonprofits To Work For.

For large organizations that participated in Best Nonprofits but did not make the cut, the average tenure was just more than seven years. It was the widest gap as far as CEO tenure between large organizations that won a place on the list and those that were not. PHI ranked No. 4 among large organizations (those with 250 employees or more in the United States) and No. 48 overall in the 2019 Best Nonprofits To Work For report.

Now in its 55th year, the Oakland, Calif.-based PHI has between 600 and 700 employees at any given time, scattered around the globe. The majority of staff are located in four U.S. offices, including three in California (Monrovia, Oakland and Sacramento) and another in Washington, D.C., all of which have more than 100 employees. There also are one or two employees in at least a dozen states, as well as expatriates around the world, including South America, Asia and South Africa.

The Public Health Institute finished No. 4 in the large organization category.

That’s not to say that CEO tenure is a deciding factor in determining Best Nonprofits. Harrisburg, Pa.-based Best Companies Group (BCG) surveyed employees on communication one of the areas where large Best Nonprofits distinguished themselves from the rest of the pack, outpacing the field by 10 percentage points in the category of Culture and Communications (87 percent to 77 percent).

With so many employees, in so many places, there’s no such thing as over-communication at PHI. “You can’t have too many ways to have touch points within the organization,” Pittman said.

The biggest challenge is keeping people engaged in an environment where there’s a geographic disparity among offices and headquarters, according to Dill. “Headquarters is viewed as ‘those guys’ in organizations that have that geographic footprint. Here it’s becoming a lot less so. Less center of universe and more importantly a partnership,” he said.

Wounded Warrior Project (WWP) ranked first among large nonprofits and No. 5 among large organizations.

The biggest challenge is keeping people engaged in an environment where there’s a geographic disparity among offices and headquarters, according to Dill. “Headquarters is viewed as ‘those guys’ in organizations that have that geographic footprint. Here it’s becoming a lot less so. Less center of universe and more importantly a partnership,” he said.

For large organizations in the Best Nonprofits cover 100 percent of health premiums, compared with just 14 percent of large organizations that did not make the list. Large Best Nonprofits also squeezed a few extra paid holidays into their calendars, an average of more than 12 compared with fewer than 10 for large nonprofits.

The organization has made a commitment to do that two times a year, the next one scheduled for this month. “People really need to have that connectivity,” Pittman said, adding that an internal employee newsletter also helps share information.

“You have to communicate. You have to do it in multiple ways, over and over again,” said Valerie Woodson, director of human resources. The American Arbitration Association (AAA) is headquartered in Lower Manhattan but has 28 offices in 20 states with a total employee headcount of almost 600. In an organization with such a wide geographic footprint, the key role for human resources to play is to be present and accessible, according to Eric Dill, vice president, human resources. “We use technology as best we can to overcome the geographic impediments,” he said. But they also do plenty of site visits.

The HR staff and CEO try to get to various locations several times throughout the year, Dill said, hosting town-hall style meetings.

AAA ranked No. 49 overall among Best Nonprofits and No. 5 among large organizations.

The biggest challenge is keeping people engaged in an environment where there’s a geographic disparity among offices and headquarters, according to Dill. “Headquarters is viewed as ‘those guys’ in organizations that have that geographic footprint. Here it’s becoming a lot less so. Less center of universe and more importantly a partnership,” he said.
LARGE NONPROFITS
continued from page 7

large organizations that didn’t make the cut. Similarly, 60 percent of large organizations that made the top 50 offered paid time off (PTO) compared with only 29 percent that were outside the top 50.

Dill recalled the story of a staff member who relocated to the West Coast last year because the person got engaged. The employee stayed enrolled in AAA’s benefits program because it was so much better than the benefits at her spouse’s for-profit employer.

“Any nonprofit or HR person will tell you, that’s the best phone call you can ever receive,” he said. Dill emphasized the general duty of care for all welfare and benefit programs is the retention aspect; employees appreciate it.

Benefits at PHI also rank high. “Yes, we have great benefits but what we hear when we ask, what describes us best, [employees] tend to talk about flexibility, support, equity, great co-workers, and yes, the benefits are good,” Pittman said.

All large organizations in the Best Nonprofits study allowed paid time off for community service activities or volunteer work compared with less than three in 10 large nonprofits that didn’t make the list. Another unanimous area for large nonprofits was employee bonus or incentive programs. Among large nonprofits that did not make the list, only 71 percent offered such programs.

Four of five large Best Nonprofits also offered cafeteria or meal subsidies, free snacks or beverages; only 29 percent of large organizations not on the list did so.

“The kind of work we do is important and the support to our employees to do that meaningful work is just as important,” Woodson said.

“We understand that people are our best assets but we’re also a great organization with a great reputation so we have to make sure our business needs are met,” Woodson said. “The only way to do that is attracting good people and keeping them.”

Both organizations also noted their programs for recognizing employees. At AAA, the president’s award goes to employees who live and exemplify its core values. Ordinarily, it’s three employees who are feted in three categories, Dill said. CEO India Johnson announces the winners’ names in a company-wide conference call and you’ll hear staff in that respective office cheer. Only the last time, in a surprise move, the CEO continued past three, recognizing six staff. “One thing you can predict is that she can be unpredictable,” Dill said of Johnson.

“At PHI, employees also are celebrated for various accomplishments. It could be programmatic, completing a major project, or publishing something with a major impact, or even something on their personal time, professional organizations that they may get to a point of leadership, or completed a marathon for the first time that they aspired to do. Professional development also has to have a personal development side to it, Pittman said.

“Besides the mindfulness, trying to help people be able to look at financial stability, we also try to do fun activities, celebrate the diversity of our organization,” she said.

Woodson “feels really good” about PHI’s voluntary turnover rate, which can range from 10 to 13 percent over the year. “A lot of employees have been around a long time,” she said, pointing out Pittman’s executive assistant, who has been with the organization 37 years, and PHI’s general counsel, who has served almost 40 years. Woodson herself has been at PHI for a quarter-century.

The lowest positive response rate for large Best Nonprofits on the Employee Benchmark Report was 84 percent in Training, Development and Resources.

LARGE NONPROFITS continued on page 9
Medium Organizations
Sharing Meals, Group Events, Schedule Flexibility
Keep Staff Together And Organizations Thriving

By Paul Golery

N onprofit work isn’t for the faint of heart. It isn’t for the glory or remuneration that allows you to retire early. So, you need a pretty good sense of humor.

Take the Space Foundation in Colorado Springs, Colo., for example, which has a lounge and meetings area they rent out called “Area 51.” It is not used by aliens, at least of which they are aware.

or somewhat new to the organization are the chief executive, chief operating officer and head of human resources.

Every employee is just above 30, according to Dill, reaching 34 hours last year.

The main unique benefit “is a true work-life balance. There’s one free day per month,” said Vinson. “It’s whenever they want it and it doesn’t go against the PTO (paid time off) accrual,” she said. There’s also a two-week break around the December holidays and flexible shifts.

She referred to the team as “space geeks” who are rabid seekers of information. The organization budgeted $125,000 annually for the roughly 60 employees to better their skills. The organization uses LinkedIn Learning and there is access to on-demand training and webinars where staff members “can build a learning path,” she said.

Responses to the Best NonProfits study from employees at medium-sized organizations showed common bonds and opportunities were very important, and topped or tied their larger brethren when asked their reactions in eight categories. Those categories were: Leadership and Planning; Culture and Communications; Role Satisfaction; Work Environment; Relationship With Supervisor; Training, Development and Resources; Pay and Benefits; and, Overall Employee Engagement.

The lone area where organizations with 50 to 249 employees came out behind larger organizations was in the Pay and Benefits category. Respondents at medium-sized organizations did not score their organizations as well as those from larger organizations did on the questions within the category. “My pay is fair for the work I perform” and “I’m satisfied with the tuition reimbursement benefits,” two and three points behind respectively.

“We started letting family and friends in and word kind of got out. Now people rent it to watch things like the Super Bowl. It’s a revenue stream we weren’t expecting,” said Kathleen Vinson, vice president of operations.

Even though the organization has been in transition at the senior management level, staff still gave the organization high enough scores to finish No. 37 overall and No. 21 in the medium-sized organization category (51-250 employees). One shock was the death of former CEO Elliott Pulham who had planned to do a lot of traveling in retirement. He retired, was diagnosed with brain cancer and died within months of leaving the organization.

Much of the C-Suite has transitioned during the past two years. “Change came over us as a tidal wave,” Vinson said. New employees are responsible for honing their own professional development plan. The organization is coming toward the end of a pilot program in its largest business unit where it’s invited staff to participate in professional development. That includes a mentor, assessment of skills and talents, and some one-on-one coaching to define a direction, ask employees what they aspire to be and complete an honest self-assessment. “We have the conversation with them,” he said.

AAA has promoted almost 10 percent of staff each year for the last several years, he said. “We try to grow from within as best we can. It’s this notion of continuous improvement, which requires continued development,” Dill said.

AAA has been able to winnow its turnover rate from about 17 percent in 2015 to 11 percent last year. To Dill, that translates to cost savings — approximately $185,000 that could be reinvested into other employee programs.

What’s most expensive is healthcare. In 2013, AAA transferred from an insured platform on medical benefits to a self-insured program. It assumes some more risk but it also saved more than $5 million over that period. That savings can be reallocated to strategic programs, for instance, covering the estimated $200,000 cost a student loan repayment that was recently launched.

“That’s the challenge for any nonprofit, you don’t know where your dollars are going to come from. Nonprofits tend to be a lot more conservative, for a good reason, spending around benefits. You don’t want to offer something and then have to take back in a year or two,” Dill said. “During austere times, one of the first things you see cutback is tuition assistance,” he said. As far as loan repayment assistance, “there’s a factor there you can speak to employee retention and recruiting — there’s a trade off,” Dill said.

“If you’re saving $1 million a year because of restructured existing programs, but did not impact or carve into the level of benefits, you can spend that money elsewhere on benefits,” Dill said, such as reduced copayments for employees. NPT
At least 52 percent of employers on the list contribute between 75 percent and 100 percent of vision coverage. Some 89 percent have flexible spending accounts and offer an average 11 holidays per year. And, 70 percent report having telecommuting options and 56 percent permit time off for community service/volunteer work.

Of the top medium-sized respondents, 56 percent reported offering paid time off as a bank of days that includes vacation, sick and personal days, and all offered either a 401(k), 403(b) or Section 457 retirement plan. Of organizations making the list, 85 percent match some form of retirement plans. While 74 percent make the list, 85 percent match some form of retirement plans. Of organizations on the list offered health care benefits.

Dependent coverage was offered at 11 percent of organizations in the category and 50 percent pay between 75 percent and 99 percent of dependent coverage. Just 4 percent did not contribute to dependent coverage.

Trips to the dentist are also covered in some form by employers on the list, with 52 percent paying the entire premium and 26 percent paying between 75 percent and 99 percent of it.

Family is important to the medium-sized organizations with all on the list having flexible hours for school events or taking a family member to the doctor. Organizations on the list provided full or partially-paid leave for birth or adoption of a child (67 percent) and 37 percent provide adoption assistance, such as reimbursement of agency fees. Nearly three-quarters (70 percent) provide lactation facilities.

On-site personal development and/or stress management workshops, seminars, or classes are offered by 74 percent of those on the list and 85 percent provide an employer-sponsored Employee Assistance Program (EAP) which might provide counseling for marital, parental or financial problems, and/or assistance for specific conditions such as substance abuse, smoking or gambling.

There’s no overtime or it’s kept to a minimum at 93 percent of medium-sized organizations and meetings and staff-only events are limited to during work hours at 70 percent of the best places to work. Fully 96 percent of workers reported:

“I like the type of work that I do.” And, 95 percent understand their importance to the organization’s success while 91 percent responded that they are given enough authority to make decisions.

A new strategic plan in 2013 started transforming the atmosphere at American Association for Clinical Chemistry (AACC) in Washington, D.C. “It used to be a group of silos,” said Molly Polen, AACC’s senior director, communications and public relations. The nonprofit finished No. 43 on the ranking and No. 25 in the medium-sized category.

“A lot of folks had programs they had been working on a long time,” she said. The strategic plan pushed people to be more open and stressed the “need to all be working together to meet these goals,” said Polen. The strategic plan pushed people to be more open and stressed the “need to all be working together to meet these goals,” said Polen.

Conflict resolution is important at The Space Foundation and AACC. At the Space Foundation, employees are encouraged “as a rule to talk to each other. There seems to be more impact to talk it through and resolve it themselves,” said Vinson. Of course, human resources and encouraged “as a rule to talk to each other. There seems to be more impact to talk it through and resolve it themselves,” said Vinson. Of course, human resources and an open door policy of the chief executive can also resolve differences.

As Polen said, attention is valued at AACC. It means “their work is visible and people appreciate it.”

The Lord’s Place came in No. 4 in the medium-sized category.

NPT'S BEST NONPROFITS TO WORK FOR – 2019

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<td>iMentor (157)</td>
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When you have a strong financial foundation, you can be confident in sustaining your mission. PNC serves nonprofits through a seamless business model that offers the size and capabilities of a major national bank along with the values and community focus of a Main Street bank. Whether you need insight on credit products, treasury management or capital markets, we can deliver solutions that prepare your mission for the future, so you’re ready for today. For more information, please visit pnc.com/publicfinance.
Small Organizations
Mission Ties Staff More Closely Together Than At Larger Organizations In The Survey

BY PAUL COLERBY

Managers at the Travis Manion Foundation had some trial and error when staffing the organization. In one case a new employee lasted less than one week.

The Travis Manion Foundation is small, or because of its size, there are opportunities for professional growth. Five of the 49 employees recently were promoted into new positions. Staff turnover is 6 percent, a number Jabin said has been consistent.

Responses to the study from employees at small organization topped or tied in several categories, with 44 percent of those on the list and 61 percent providing adoption assistance, such as reimbursement of agency fees.

Executives at Nuru International in Irvine, Calif., described the organization as “distributed.” That means everyone is out in the field and gather for an annual one-week summit. It’s one full week of working sessions, explained Marc Rahives, chief operating officer. Nuru finished 10th in the small organization category and 28th overall.

While Rahives described “the top benefit” as being able to work remotely, the infrastructure to support the staff is incredible. There is an “extensive duty of care” program that includes medical evacuation due to the “slightly more dangerous environments” in which some staff work. There are also “psychological first aid” programs.

There’s an extensive time-off policy that goes beyond vacation and a mandatory two-week shutdown around the holidays, said Rahives. There are also “R&R days” because staff often travels nights and weekends.

That doesn’t mean it’s a free-for-all when it comes to time off. “We have an extensive HR dashboard balanced scorecard” that also looks at certifications and diversity. “It’s one of our strategic pillars,” said Rahives.

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Moore DM Group has again hired away a leader from a leading firm in the nonprofit direct response industry. Gretchen Littlefield, president of Infogroup Media Solutions, is going to the Tulsa, Okla.-based firm as chief executive officer.

Company founder Jim Moore will continue as chairman focusing on acquisitions and strategic growth. Geoffrey W. Peters will move into the role of chairman of the Moore DM Group executive board, focusing on product innovations and advancement of neuroscience and its impact on fundraising.

“The addition of Gretchen will bolster our already strong leadership team as we continue on our path of strategic growth and transformation,” said Moore. “Gretchen’s knowledge of the ever-transforming marketing landscape will play a pivotal role in furthering the Moore DM Group commitment to being thought leaders and innovators in the nonprofit industry.”

In her role at Infogroup, Littlefield directed the nonprofit, business-to-business and business-to-consumer integrated data and marketing services business units. Under her direction, the media strategy group experienced rapid growth with innovative products that were vertically focused, serving major industry sectors including retail, nonprofit, publishing, consumer, business and technology. Insiders said those roles will probably be split between two executives, at least one of whom is already with the firm.

“I am excited about the amazing growth taking place at Moore DM Group. The company is well-positioned to be the leader in marketing automation and I’m thrilled to be a part of it,” said Littlefield. Littlefield is well-known in the nonprofit arena, launching multi-million-dollar fundraising programs, building services and helping lead nonprofit and marketing advocacy organizations. She had been with Infogroup for 13 years.

Littlefield is also vice chair of The Nonprofit Alliance.

Prior to joining Infogroup, Littlefield launched the fundraising program for a national organization which raised more than $80 million in two years. She also served as a director in one of the nation’s leading direct response marketing agencies. In 2009, she was selected as a Rising Star by Marketing Edge, the educational foundation of The Direct Marketing Association. She is currently co-chair of Marketing Edge.

Moore DM Group is comprised of 32 companies with more than 2,000 employees devoted to nonprofit work. The organization provides services including strategic consulting, creative development, media planning and buying, research and analytics, production management and product fulfillment, database services and public relations to nonprofit, association, commercial and government clients, and is a key contributor to strengthening the sector.

Among the Moore DM Group companies working in the nonprofit industry are CDR Fundraising Group, Barton Cotton, Direct Donor TV (DDTV), Production Solutions/PS Digital and Redfield & Co. Moore DM Group has operations in California, Colorado, Georgia, Kansas, Maryland, Massachusetts, Oklahoma, Virginia, Hong Kong and Toronto.
Continued from page 1

average tenure of a nonprofit CEO was almost 13 years. Overall turnover was about 12 percent, according to the study.

Specifically within the public-society benefit subsector where United Way resides, CEO tenure was 11.5 years. Tenures generally were longer at larger organizations, with less than eight years at nonprofits with budgets of less than $500,000 and more than 18 years at organizations between $25 million and $50 million. Since 2010, CEO tenures typically have been longer than a decade at organizations of at least $1 million, according to The NonProfit Times research on the sector generally.

Most all of the executive director searches since the start of 2018 by Naperville, Ill.-based KEES/Alford Executive Search have been the result of retirements, according to President and CEO Heather Eddy. What’s happening at United Way affiliates isn’t likely any different than retirements from other nonprofits. “It’s widespread across the sector — but it’s an easy one to aggregate because United Way is so well known,” she said.

There’s not a lot of new data on executive turnover or retirements, Eddy said, pointing back to The Bridgespan Group’s 2006 research that predicted that as many as 640,000 new senior managers would need to be hired in the nonprofit sector within 10 years of the report being published.

Baby Boomers naturally aging might be a source of turnover and retirements could be impacted by a good economy as people step down while their retirement funds are still intact, before a recession potentially disrupts the markets and, in turn, 401(k) plans.

Eddy said her firm has done more projects around job and growth coaching the past several years but those second-level leaders are still few and far between. “The way United Ways are structured, unless they’re large, there are not many No. 2s at United Ways,” she said.

It’s important that nonprofits be intentional about their leadership plan, Eddy said. Even if an executive director is only approaching age 60, it’s critical to talk about leadership. “Most boards still shy away from that issue because it’s a difficult issue,” she said.

Building Future Leaders, a project of The Bridgespan Group, aims to get nonprofit leaders thinking about future leadership needs and to identify competencies. “How do you begin to assess and develop your people to fill those leadership gaps that you’ll have in two or three years,” said Kirk Kramer, a partner at The Bridgespan Group and co-author of the 2013 paper, “Nonprofit Leadership Development: What’s Your Plan A for Growing Future Leaders.”

“A general recognition these days is that it’s a real weakness. We don’t have processes in place and systems of how to do this well,” he said. In talking to CEOs and executive teams, Kramer said this is something that nonprofit leaders need to get better at, realizing there’s been a huge gap.

This summer will mark 12 years that Milton Little has served as CEO of the United Way of Greater Atlanta. “I don’t know that we are any better or worse than any other industry that is facing the same thing,” Little said, where there is a graying of the professional and managerial class. Certainly it’s been an issue we’ve talked about at the local level. We’ve put procedures in place around succession and there’s been encouragement from United Way Worldwide to be more intentional in those ways,” he said.

UWW invites new affiliate CEOs to its annual conference in Alexandria, Va., headquarters each January for a three-day leadership conference called the New Presidents Forum (NPF). The forum typically attracts 70 to 75 attendees, according to Dinofrio. The physical event was launched in 2014 but UWW has been offering resources and tools to new chief executives for years.

Webinars continue throughout the year after the forum on a variety of topics, ranging from human resources and diversity to marketing and the United Way brand. There also are five e-learning modules that touch on broad topics but are helpful for first-time employees, she said, and also have sections specifically for CEOs.

Based on feedback from participants, the forum has evolved to include more networking opportunities and exercises amid an effort to get them with colleagues of similarly-sized affiliates, Dinofrio said. Sometimes the answers to their questions can be found with colleagues in another state, she said, pointing to the experiences of Houston’s affiliate after Hurricane Harvey helping affiliates in North Carolina when they were hit by Hurricane Florence.

“No year is the same. There are different world situations, different economic situations in their local communities,” Dinofrio said. United Way often is a leader in its community and sometimes answers can be found at colleagues in another state.

Responding to feedback from attendees, the forum has evolved to include more networking opportunities and exercises amid an effort to get them with colleagues of similarly-sized affiliates, Dinofrio said. Sometimes the answers to their questions can be found with colleagues in another state, she said, pointing to the experiences of Houston’s affiliate after Hurricane Harvey helping affiliates in North Carolina when they were hit by Hurricane Florence.

Tight Budgets Necessitate Joint Operations Between United Ways

Paul Mina took over as CEO at United Way of Pioneer Valley in Springfield, Mass., this past October. He’s also CEO at Tri-County United Way in Framingham, Mass., for many years and has been in the United Way system for three decades.

The two affiliates, separated by about 70 miles, entered into a management operations contract last fall, sharing the positions of CEO and CFO. The Pioneer Valley affiliate had fallen on difficult times and experienced significant turnover in recent years, Mina said, so consistency was needed to stabilize the organizational operations.

The initial management agreement is for 2½ years, with the ability to extend it “as we see fit on both sides,” Mina said. For handling CEO and CFO duties, Tri-County receives a percentage of gross revenue from Pioneer Valley. Mina de- clined to cite a specific percentage but described it as in line with what generally accepted indirect costs would be. “It’s very reasonable for them and for us. It gives us added incentive to produce, not because United Way is so well known,” he said.

Mina has been involved in seven mergers during his tenure, including five affiliates and two other agencies. A management agreement was the better option at this point because mergers take time, he said, requiring a period of time raising money. “I’m not exaggerating at all that it’s 10 times harder to raise money today than 30 years ago,” he said.

Payroll deduction was the hallmark for workplace campaigns, and that’s “a very hard act to follow,” Mina said. “People don’t need payroll deduction any more. Most don’t consider it a plus at all,” he said. United Ways must change their model, with more of a focus on individual giving, cause related giving, and they’ve become much more aggressive soliciting individuals of high net worth.

The whole expectation has changed during the past decade, according to Mina. While there’s always a focus on return on investment (ROI), he said it’s even more acute now. The decentralization of workplaces and foreign investment have been good for the economy but not necessarily for United Way or local charitable giving, he said. “Most charities are in the same exact place that we are. We’re probably stronger because of our size and brand than most,” Mina said.

Donors are becoming much more interested in seeing a direct path from their wallet or paycheck to impact, said Milton Little, CEO of United Way of Greater Atlanta. They place less importance on intermediary organizations and companies that run United Way campaigns continue to rethink how they pursue their sustainability and social responsibility objectives, he added.

Young professionals might not be as excited for workplace campaign as their parents and grandparents were, Little said, and have different ideas about what philanthropy is and what community involvement needs to look like. They’re also more likely to be engaged in community work through technology than previous generations.

“These present unique challenges that all United Ways need to address. We happen to be in a city that sees lot of those and might see the pressure more acutely,” he said.

CEO Turnover At UWs Hits More Than 100

It’s important that nonprofits be intentional about their leadership plan.

Paul Mina. While there’s always been a focus on developing leaders, Milton said, United Way is so well known, “we wouldn’t anyway,” he said.

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other state. “It’s something you can’t get anywhere else.”

Sean Garrett credits his start to the United Way Community Fellows program, where he spent a year learning on the job at the United Way of Dane County in Wisconsin. As a 25-year-old, he found himself working with corporate CEOs on some of the biggest challenges facing communities. “You don’t get that kind of experience in a lot of places. I got to be able to be part of that work,” he said. He left Charlotte, N.C.-based United Way of Central Carolinas last year after almost four years as executive director to become CEO at United Way of Metro Chicago.

A combination of more traditional conferences and learning opportunities can help you train on tactical, specific skills and on-the-ground exposure that’s hard to replicate what it’s like in community with corporate CEOs, neighbors and residents working on key issues.

Joanne Troutman has been president and CEO at Greater Susquehanna Valley United Way (GSVUW) in Sunbury, Pa., for about four years. She has been recruited to go elsewhere for more money but has no plans to leave because of several projects she plans to shepherd. That’s not to say she’ll be there forever. “My leadership philosophy -- and I think it’s a lot of people in my generation -- you don’t want to get to a point at which you jump the shark. Nobody ever wants to stay and wear out their welcome yet communities need stability,” she said, describing herself as part of Generation X.

Smaller affiliates often become stepping stones for people, either to a larger job at United Way or to another nonprofit. “Smaller United Ways can’t afford to pay an executive what other nonprofits can,” said Troutman. “It’s just the nature of the nonprofit world,” she said, and people can earn a lot more money fundraising at a hospital than at a community organization.

People leave their jobs for any number of reasons: higher salary, less stress, relocation, or something more personal. Jon Fine is retiring after 18 years as CEO of United Way of King County. The Seattle, Wash.-based affiliate routinely is among the highest-revenue affiliates in the UW system. He described his decision to retire as a natural course of events. “Life is finite and you can’t do these things forever. We’ve gone through a successful transformation. It felt like the right time,” Fine said.

“United Ways have had to transform themselves because workplace giving is not as widespread, it’s not growing,” Fine said.

“United Ways are capable of transforming, we in Seattle have illustrated that,” he said, now oriented more toward individual giving, affinity groups and events. “United Ways can continue to raise significant amounts of money but they have to do it in new ways. That transformation is not always easy, sometimes it leads to turnover,” said Fine, who joined United Way from running a local Red Cross chapter after three years as a stay-at-home dad. Previously, he was treasurer of Puget Sound Bank.

Turnover might be up a little but not unnaturally, Fine said. These are stressful, volatile times, he said, and that creates turnover. “Certainly, there’s burnout in the nonprofit world,” Fine said, adding that expectations are higher and problems exist while often the financial or technology resources that people want might be lacking, which does sometimes lead to burnout.

“The recession certainly created volatility and competition has created volatility. I don’t think those trends are ending, I do think there are ways of successfully dealing with them as we’ve proven in Seattle,” Fine said. NPT
Boards Represent Membership

Staying in the loop takes a concerted effort of everyone

Editor’s Note: Susan J. Ellis, president of Energize, a Philadelphia-based training, publishing & consulting firm specializing in volunteerism, died recently. She battled cancer for eight years. The board mourns her contribution to The NonProfit Times, writing more than 100 columns. This was her last column for The NPT

Most discussions of boardsmanship assume a service-providing agency governed by a self-perpetuating board to which outsiders are recruited because of their wealth, talents, or connections. The nonprofit world also includes a range of membership associations – from professional societies to “friends of” fundraising bodies – in which the majority of board positions are filled by members of the association, either by election or appointment.

Both types of boards hold similar legal authority, but the members of an association board have a different responsibility to the general membership of which they are a part.

Association members know that joining the board is an elevation in status and carries perks, from a reserved table at the annual banquet to certain expense reimbursements to privileged knowledge of confidential association business. Of course, those benefits are earned by contributing greater time and work for the good of the association than an ordinary member.

But the more deeply involved board volunteers become, the more likely they are to feel that the average member is disenaged from or even uninterested in the issues that have now become the focus of their attention. It’s a self-fulfilling cycle that leads to separation.

Here’s an example of how this happens in communications. While regular members receive periodic, brief updates on the work of the association, those on the inside of decision-making receive lots and lots of information. At times, they probably feel they are drowning in it.

In the process, the board learns the nuances of why a proposal is adopted or fails, why money is spent on one thing but not another, and how staff priorities are set. It can be a surprise to hear members question any of this. What might be a matter of insufficient information is misrepresented as a challenge to the competency of the board, and a circle-the-wagons defensiveness can emerge.

Easy as it is for board members to grow distant from the general membership, it isn’t inevitable. Avoiding this trap requires paying attention.

One of the most effective techniques to stay connected with members is simple. At each decision-making juncture in any board meeting, assign someone the task of asking, “How will this affect the average member?” If you aren’t certain of the answer, don’t make the decision until you field-test the idea.

It’s also important that all board members continue to attend regular member meetings, especially local chapter meetings if the board is at the state, regional, national, or international level. This keeps board volunteers tied to day-to-day association life. It’s fine to attend meetings only periodically because of the time demands of board work. But every board member should nevertheless be encouraged to stay connected with the “home” group in some way.

In addition to making sure board members keep going back to the local level, bring regular members to the board. Invite association members to speak at board meetings, either to explain proposals or activities in which they have a personal stake or simply to make a regional report. Since most association boards are elected by the membership, there is no good reason why board meetings should be closed to such participation.

Her’s still another simple but powerful idea. Commit each board member to telephoning one association member a week. The staff can randomly select the names and distribute the list monthly. These are not cold calls, as both people are already connected to the association.

To guide the conversation and record the gist of the discussion, develop a brief telephone call response sheet. It can be on paper to fax in, or electronic to zip off via email. Key questions can change from month-to-month to solicit input on any number of association priorities.

Such calls serve several purposes:

• Keeping the board member in touch with issues on the ground;
• Generating useful spot-check survey data; and,
• Making the members contacted feel positive about the association’s leadership. There’s nothing like a little attention to make people feel visible and supported.

Do the math. One call a week equals 52 calls per board member a year without much effort at all. Now, multiply that by the number of board members and you’ll see the impact.

Tips for Special Gatherings

Any gathering of members – a conference, annual meeting, or special event – is an important opportunity for the board to simply mingle, talk, and listen. Accomplishing this, however, takes planning. Here are some suggestions:

• Limit the number of back-room meetings during association conferences. Although it’s understandable to want to maximize board members’ time to conduct business while they’re already on site for your convention or other general meeting, members might perceive this as a convenient way to avoid interacting with them.

• Even if this is a false assumption, volunteer leaders who are kept in private meetings simply cannot be talking to members at the same time. So, hold board meetings before or after the conference to give leaders the freedom to actually participate in the conference. This advice goes double for the executive committee.

• Never allow the board to sit together at any general membership event. Insist that board members scatter to different banquet tables, attend a range of concurrent workshops, and even sit randomly throughout the hall at a plenary session. Encourage everyone to have informal conversations, but with a purpose: Agree on one to three questions that every board member will ask during the course of the event so that afterward you can share frequent responses.

• Make sure board volunteers are identifiable. Provide special name tags, color codes, or ribbons. This gives the average member a fighting chance to recognize and talk with you.

Officers Set The Tone

The board chair establishes the board culture and therefore bears responsibility for ensuring that the sort of stay-connected activities described above become a natural expectation of any board member.

Is the chair accessible or are ordinary members put through a maze of formal procedures to get an audience? Other officers, especially the secretary and treasurer interact with local counterparts to exchange information or request or require reports. Is such contact formal or informal? Are requirements and rules handed down with little concern for how local-level members will react? Do the officers give plenty of warning about changes in procedures, or do these changes come as a surprise? How comfortable do members feel about asking for clarification from the officer or even in challenging the rationale or process? Strategize how to overcome or prevent an us-and-them culture. For example, get feedback on ideas before they are enacted, perhaps with a quick survey form that the board e-mails to a random selection of members.

Hold online chats between board members and general members at announced times and on specific subjects. Even if only a few members participate, you get a lot of good will from publicizing these opportunities – they imply openness to interaction.

The Staff’s Vital Role

Long-time paid staff members who have gone through many changes of board membership can be a great asset in supporting the board’s efforts to stay connected. They can orient new leaders to established practices such as the ideas described here (or recommend them for discussion and adoption) and model them in their own work with members.

Conversely, an association might have veteran leaders and a changing corps of employees. In that case, the board chair needs to encourage ways to engage staff in setting the tone. Staff members are the ones who have daily contact with association members. They possess invaluable knowledge of what people are saying and feeling. How often do you give them the opportunity to bring that information to the board table? NPT
Your Donors

3 strategies to build multichannel relationships

Multichannel donors – those who give to your nonprofit in more than one way – believe in the work you’re doing. They follow your organization closely and support you in every way they can. They give online through your website and emails. They like and share your social media posts. They attend your fundraising events, sign up for volunteer opportunities, and invite their friends to come along, too.

Data shows that donors who engage with your nonprofit in multiple ways stick around longer, and in turn, give more. Data shows that multichannel donors contribute four times more frequently than online-only donors, and offline-only donors, and (on average) twice as much money as online-only or offline-only donors.

Here are 4 strategies to help build those relationships.

- **Strategy #1:** Get to know your multichannel donors. You can’t grow your multichannel donors unless you know who they are, how they’re giving, and what motivates them to support you.

A successful multichannel fundraising strategy reflects a donor-first approach to every move you make. That includes building an experience across all of your digital touch points that informs donors of your work, creates an emotional connection, compels action, and encourages loyalty.

To maximize online giving, you should always pair your website, emails, and social media campaigns with a variety of ways for donors to support your cause that are quick and easy. It’s not just for your donors to engage, but also for you to manage.

Your website serves as the central hub of your organization’s online activity. In today’s digital world, a modern, updated website packed with touching photos, heartfelt testimonials, donation and registration forms, and social feeds is a must. And for multichannel donors, your website can be their single source of information to keep up with your latest fundraising campaigns, events, and more.

Don’t stress if your website needs a makeover. You don’t need a web team to make it happen. There are plenty of tools available to have your website up, running, and continuously updated in-house by your staff. It will always be fresh and engaging and your team will feel proud to have a part in it.

Understanding the fundraising activities, messaging, and campaigns that cause people who have given before to continuously give in new and different ways is crucial in creating engaging donor experiences that retain enthusiastic, loyal supporters – AKA multichannel donors.

Keeping track of donors and their giving patterns is no easy task, but fortunately, fundraising and donor management tools can do it for you. You can create donor profiles that help you identify who your donors are so you can effectively engage them, segment communications based on donor activity, and communicate.

- **Strategy #2:** Craft an engaging digital presence that promotes giving in multiple ways.

- **Strategy #3:** Make giving personal by hosting fun and engaging events.

Meeting donors face-to-face gives you a unique opportunity to really know them and for them to know you. The type of event you throw, the diverse personalities of your team, the way you weave your mission into the details of the day all make an impression. While events can be a heavy undertaking, there are tools to make managing volunteers, collecting gifts, and entertaining guests easier.

Nearly all text messages are read within three minutes, so leverage the power and popularity of text messaging to stay in touch with your multichannel donors. Promote giving at your event with a text-to-give keyword and short code. Encourage text message opt-ins at the event and keep your donors posted on all sorts of fundraising campaigns year-round. The best thing about text updates is that your donors will always see them.

Give your multichannel donors something to bring home by pairing your event with an auction. Whether you’re new to fundraising auctions or an experienced auctioneer, you can take the hassle out of live, silent, and online auctions with a cloud-based auction software that makes it easy and fun for your staff and your guests.

Remember, multichannel donors are fans of your organization. They give in different ways because they’re dialed into what you’re doing. Regularly reach out to your multichannel donors to:

- Thank them for their support;
- Show them how their donations are helping your cause;
- Invite them to upcoming events;
- Ask them to volunteer;
- Remind them that their generosity encourages others to give;
- Keep them updated on what’s new.

Don’t limit these communications to email. Be sure to keep your website, social media channels, direct mail appeals, and personal engagement efforts up to date.

Emily Rose Patz is a senior writer at DonorPerfect in Fort Washington, Pa. Her email is epatz@donorperfect.com. The column was excerpted from the organizations guide to multichannel donors at http://www.donorperfect.com/multichannel

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Nonprofits Face $12,000 Each In UBIT Without Law Change

By Eleanor Clift

To hear U.S. Sen. Chris Coons (D-Del.) tell it, the 21 percent tax on the value of fringe benefits awarded by nonprofits, such as free parking or transportation assistance, is “an important mistake that deserves to be addressed and rectified.”

Coons is co-sponsoring with Sen. James Lankford (R-Okla.) the Lift for Charities Act to eliminate the tax, which is part of the Tax Cuts & Jobs Act of 2017. “This is a bill that has rough edges, that was not thoroughly vetted,” Coons said, adding that no one on the tax committee in Congress or at the IRS is defending the tax.

Coons spoke at a briefing at the U.S. Capitol to discuss the findings of a report commissioned by Independent Sector to assess the impact of the Unrelated Business Income Tax (UBIT). The report surveyed 725 organizations with $9.5 billion in revenues. Almost half, 46 percent, with $8.6 billion in revenues, provided information related to the new UBIT.

Elizabeth T. Boris, a fellow at the Urban Institute where she is the founding director of the Center on Nonprofits and Philanthropy, highlighted the findings in the report. Notable is the cost of taxing transportation benefits and the burden that goes along with such reporting would add an average of $12,000 to a nonprofit’s operating cost.

Respondents found the UBIT “confusing” and Internal Revenue Service (IRS) guidance little help. Some would take “a real financial hit,” said Coons.

For smaller nonprofits, the number would be smaller, but the percentage would be high. In Delaware, his home state, DuPont donated a building some years ago to house nonprofits. There are currently 75 nonprofits at that address. Some are small, like a closet, Coons said, while others take up half a floor. They share a dedicated parking garage with 473 slots, which are now being assessed at $130 per employee per parking space.

This is a real challenge for nonprofits that have never had to calculate the value of these benefits for employees, much less divide them up multiple ways. Stuart Comstock-Gay, president and CEO of the Delaware Community Foundation, who
In fact, U.S. Representative Kevin Brady in the scope of the tax bill, is not much. Sury “a couple billion,” which all agreed if repealed, it would cost the U.S. Treasury.

Continued from page 17

But one questioner challenged Coons’ description of the tax as “a simple mistake.” The senator conceded he was being “gracious” with that description, adjusting his language to describe it as “ill-conceived tax policy.”

Others on the panel said there was a scramble to find money to offset some of the costs of the 2017 tax cut, and the impact of the UBIT wasn’t thought through. If repealed, it would cost the U.S. Treasury “a couple billion,” which all agreed in the scope of the tax bill, is not much. In fact, U.S. Representative Kevin Brady (R-Texas), who chaired the tax committee, Ways and Means, said last year that there were unintended consequences to the UBIT that needed to be fixed. He advanced an amendment, but Congress ran out of time. Now Brady is the ranking member on Ways and Means, and it’s up to the Democrats to take the lead in the House of Representatives.

“I love legislating,” Coons said, especially when there’s an issue that is “good policy, good politics, and makes a difference in the world.” Repealing the UBIT is “so focused and so important,” he said. The only problem is there is no moving vehicle, congressional parlance for the legislative vehicle that can carry the UBIT repeal through both chambers and to the president’s desk.

“There are very few trains leaving the station,” he said, urging those in attendance and the nonprofits they represent to not just have a pleasant meeting with a junior staffer but to pigeonhole lawmakers and demand to know how they will get this done, what bill will they attach it to? Coons raised the defense authorization bill and the end of the year omnibus bill as possible vehicles on which the UBIT repeal could piggyback.

[There are]...unintended consequences to the UBIT that need to be fixed.

Representative Kevin Brady (R-Texas)
Allison Staulcup Becwar is the new president and chief executive officer of Lincoln in Oakland, Calif. Becwar most recently was Lincoln’s chief program officer.

Becwar joined Lincoln in 2000 where she began as a school-based clinician, then managed school-based programs for a few years, before overseeing the operations of all of Lincoln’s school-and community-based programs. Lincoln provides 13 programs seeking to improve outcomes for families impacted by poverty and trauma in three focus areas: educational engagement, family strengthening, and well-being.

Tina Cassidy is the new chief marketing officer of WGBH in Boston, Mass. Cassidy joins WGBH with more than two decades of experience in communications, including a decade as a journalist at The Boston Globe.

Before joining WGBH, Cassidy was the executive vice president and chief content officer at InkHouse, where she helped grow the bi-coastal integrated digital marketing and public relations agency through new geographical markets, sectors and service offerings while supporting an inclusive work environment and award-winning client campaigns.

Cassidy was also a journalist with a wide-range of experience as a reporter and editor, primarily at the Boston Globe. She is the author of several non-fiction books that focus on women and culture. Her latest is Mr. President How Long Must We Wait?: Alice Paul, Woodrow Wilson and the Fight for the Right to Vote.

Bridget Doane was hired as director of development at The Abilities Connection (TAC) in Springfield, Ohio.

Doane will manage and implement TAC’s development plan and lead fundraising programs and donor relations efforts. She has more than a decade of experience in fundraising and development for nonprofits throughout Springfield and Clark counties in Ohio. She previously served in a development position at Rocking Horse Community Health Center and as director of advancement at Catholic Central School. Her most recent position was director of advancement at The Heritage Center with the Clark County Historical Society.

Micah Foster was promoted to executive director of the Grand Rapids African American Health Institute (GRAAHI) in Grand Rapids, Mich. He had been the organization’s education coordinator since May 2018.

Foster is responsible for creating a strong foundation and driving a larger vision for donor engagement, program expansion and community connection.

He previously worked with post-operative orthopedic patients at Motion Technologies, where he ensured proper fitting in range-of-motion machines, braces and cryo-therapy equipment.

Bart Landess is the new executive director of the Catawba Lands Conservancy and Carolina Thread Trail in Charlotte, N.C.

Landess has nearly 30 years of fundraising and nonprofit experience. He joined the Conservancy and the Thread Trail from the YMCA of Greater Charlotte where he was vice president of major and planned gifts. Prior to that, Landess worked at the Foundation For The Carolinas in development and planned giving.

Landess is former chair of the North Carolina Planned Giving Council. He’s also a founding member of the Institute of Philanthropy and Leadership Gift School and a former Board member of Legal Services of the Southern Piedmont (now Charlotte Center for Legal Advocacy).

Greg Lowe was appointed president of the newly-created North Carolina Division of HCA Healthcare, which includes the Mission Health system.

Lowe formerly served as chief executive officer of HCA’s Chippenham and Johnston-Willis hospitals, a two-campus system in Virginia, and Lawnwood Regional Medical Center and Heart Institute, a level II trauma center in Florida.

Before his time with HCA, he was chief executive for other hospitals including the West Tennessee Healthcare Dyersburg Hospital in Dyersburg, Tenn.

Cindy Rahman was appointed senior vice president and chief marketing officer of March of Dimes in Arlington, Va. She will oversee all marketing and communications functions and lead digital, creative and brand initiatives for the organization.

Rahman has more than 15 years of integrated communications experience, including reputation management, business-to-business communication and nonprofit/association branding. She previously served as senior vice president at BRG Communication, where she specialized in health and wellness initiatives.

Among her clients were Walmart and Walmat Foundation, Sam’s Club, Inova Health Foundation, MedStar Institute for Innovation, Massachusetts General Hospital and the Heart Rhythm Society.

Edward Ross, LSCW-R BCD, was appointed director of the Lighthouse Guild’s Behavioral Health Program in New York City. Ross has been with the program since 2013 and has played a role in developing its treatment services.

Ross has more than 36 years’ experience in the mental health field, specializing in chemical dependence and rehabilitation and social services with an emphasis on coexisting disabilities.

Ross lectures frequently with presentations at the Adult Abuse Training Institute of the N.Y. State Adult Day Services Association, Brain Injury Association of New York State Annual Conference, New York State Traumatic Brain Injury Coordinating Council, Annual Co-Occurring Disorders Conference: Partners for Recovery, N.Y. State Department of Health Traumatic Brain Injury Program Annual Training Symposiums and the Manhattan Committee on Alcoholism and Substance Abuse, as well as the American Association of Clinical Social Work in Psychoanalysis.

He has served as Co-Chair for New York State Office of Alcohol Substance Abuse Services (OASAS) Traumatic Brain Injury Advisory Council, Board Member for Coalition of Behavioral Health Agencies, Advisory Board for Center for Rehabilitation and Recovery and Board Member and Faculty at New York Institute for Self Psychology.

Amy Borman Somek was appointed director of development for The Jewish Museum of Florida-FIU, part of Florida International University in Miami, Fla. Somek was the director of development at the Greater Miami Hebrew Academy, the oldest Jewish day school in Florida, founded in 1947.

Her career includes experience in designing comprehensive development programs, annual campaign plans and strategies, corporate sponsorships, cultivation of prospective donors, and directing fundraising programs and events. She has a broad knowledge of the Jewish Communities, and the business and philanthropic arena.

Jennifer Turner was appointed president and chief executive officer of the Tennessee Performing Arts Center in Nashville.

Turner currently serves as the executive vice president and managing director for Segestrom Center for the Arts in Southern California. With more than 20 years of experience in nonprofits arts, Turner previously was the chief operating officer for the national historic landmark Auditorium Theatre in Chicago and held roles with Michigan Opera Theatre, Shakespeare Theatre Company and Harper College.

Ryan Welch joined Morris Animal Foundation in Denver, Colo., as chief development officer. Welch, who most recently was with the Foundation from Rocky Mountain Public Media (RMPM), is charged with setting strategies and priorities to advance the Foundation’s mission of bringing together science and resources to address critical animal health challenges.

Welch has 16 years of fundraising and relationship management experience. During his nine years at RMPM, he built and maintained relationships with foundations, stakeholders and community partners.

He also is active in the community as a board member and development chair for Bright by Three, and a member of both the Colorado Planned Giving Roundtable and the Colorado Association of Fundraising Professionals.
# Resource Marketplace

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