December 2013

On Board Newsletter: A Look Back at 2013

Jacobson Jarvis is proud to be a sustaining resource to the not-for-profit community, particularly in the area of board development and financial literacy.

Introduced in 2012, On Board is a newsletter we developed exclusively for board members who want to stay aware of pressing issues affecting the not-for-profit community and, by extension, their own organizations. This past year featured a number of well-known not-for-profit experts sharing their perspectives on board recruitment, investing, fundraising and more.

We thank you for reading and we look forward to another year of interesting and informative content. If there are any topics you’d like us to cover in 2014, or if you know someone who would like to receive this newsletter, please contact us at boards@jjco.com.

In case you missed any issues of On Board, the following is a recap of what we published in 2013:

March 2013

“Recruiting a Strong Board”
By Jan Levy, Executive Director, Leadership Tomorrow

One of the most important keys to success for any not-for-profit organization is a strong board. However, it is common for some organizations to become too formulaic with their recruiting strategies. In this article Jan Levy shared why that approach can be detrimental to an organization’s success, and provided her advice for improving recruitment efforts. Read the article.

May 2013

“Bonds Are Still Important to Your Portfolio”
By Polly Sidwell, Morgan Stanley

With such low interest rates, board members might be wondering whether there are any advantages to holding bonds in their organization’s investment portfolio. However, given the long-term nature of investments, it may be wiser to explore modifications to those holdings instead of eliminating them. In this article, Polly Sidwell discussed the importance of a diversified investment portfolio, including the advantages of bonds. Read the article.

July 2013

“Major Fundraising Campaigns: Is This the Right Time?”
By Aggie Sweeney, Collins Group

With the economy showing signs of improvement, it may be tempting to fire up the fundraising engine.
But a strong economy is only one of the many factors that influence the success of a fundraising campaign. In this article, Aggie Sweeney discussed the six elements of success relative to fundraising and what organizations should consider before diving headfirst into a fundraising campaign. Read the article.

September 2013

“Helping Board Members Own the Budget”
By Susan Howlett, award-winning board development consultant

It happens in board meetings at organizations large and small - the financial statements are presented and many board members glaze over the numbers before moving on to the next agenda item. This isn’t due to apathy. It is likely because they haven’t been taught what to look for on the reports or what to ask in order to generate meaningful conversations. In an excerpt from her book, Boards on Fire: Inspiring Leaders to Raise Money Joyfully, Susan Howlett talks about the positive impact of an informed board and what an organization can do to kick-start the education process. Read the article.

November 2013

“The 3 Secrets of Market Leaders”
by Heather Fitzpatrick, CPA and CEO of MarketFitz, Inc.

Have you ever wondered why some organizations are successful no matter the economy? The answer has to do with marketing, but not in a promotional sense. According to Heather Fitzpatrick, the success or failure of an organization has more to do with how well the executive team manages marketing than the marketing team’s implementation of a plan. In this article, Heather shared the secrets of market leaders gleaned from her research (also featured in her book, Marketing Management for Non-Marketing Managers: Improving returns on investment), and offered advice for what board members can do to ensure that their organizations thrive despite the economy. Read the article.