



10 PRACTICAL IDEAS FOR DEVELOPING AND MAINTAINING EFFECTIVE BOARDS

Here are ten ideas that you can implement now to create the kind of voluntary leadership that will provide a Nonprofit organization with strong and viable resources to support its development program. Underlying all these ideas is the notion that positive, meaningful relationships are being created between staff and volunteers as well as among the volunteer leaders themselves.

ONE: To create a buy-in mentality, board members must be active participants in developing, revisiting and monitoring organizational documents that create the infrastructure of the organization. Documents include the mission statement, a statement of philosophy/core values, the vision statement, a comprehensive strategic plan and the bylaws.

TWO: To ensure thoughtful decision-making and practiced consistency, board and staff leadership must develop governance policies that reflect organizational values. These may include: conflict of interest, financial policies related to investments and risk management and contribution policies related to gift acceptance and use of funds.

THREE: To ensure appropriate board membership mix, board leadership and staff executives (or a board development committee) must institute a comprehensive annual board assessment process including:

- **Board Profile:** Develop and use a matrix to capture demographic information about each board member (age, gender, place of residence, skills, experience and expertise). From this you can ascertain what areas are covered and where you need to "fill-in" with new board members.
- **Board Performance:** Develop and use a matrix to assess the level of participation of each board member with regard to committee work, raising funds, making personal donations, serving as an ambassador, etc. From this you can determine which board members are "pulling their weight" and which ones need more attention, or perhaps need to be replaced.
- **Board Self-Evaluation:** Develop and use a self-evaluation tool that enables each board member to assess his/her performance. A well-constructed evaluation tool provides the means by which members who are not doing a good job can decide to either resign or strengthen their commitment to the organization.

FOUR: To create an ongoing leadership development program, the board must commit to a year-round board recruitment program. Program elements to consider:

- A process for identifying and recruiting board members.
- Creating and using materials that help potential board members learn about the organization and the role they are expected to play.
- Determining organizational needs and identifying board candidates who can provide skills and experience to meet these needs.
- Selecting individuals who will focus on addressing organizational goals -- both mission-based and resource development.

FIVE: To ensure that everyone understands their roles and responsibilities as board members, the board must develop a board position description. The "job" description should include roles and expectations related to governance, resource development, communications/ marketing and, if appropriate, volunteering. Each member should sign this document annually. You can also include this "job" description in your board recruitment tool box.

SIX: To ensure ongoing dedication by board members, each member must be provided with a meaningful job assignment:

- At the time an individual is recruited, discuss organizational needs and how the organization would like to utilize his/her expertise.
- Make committee assignments a part of the orientation process by matching individual interests and expertise with organizational needs.
- Ask committee chairs to recruit committee members who are personally loyal to them and are committed to the organization

SEVEN: To discourage "rubber-stamping" of staff work and ensure active engagement of board members, plan board meetings that promote active participation by board members by:

- Developing agendas that require involvement by many people.
- Requiring committee activity updates (also provides impetus for committees to actually make progress).
- Monitoring the strategic plan at each meeting.

EIGHT: To create a trusting environment, board members must be given ongoing opportunities to provide feedback -- at board meetings, annual retreats, committee meetings, etc.

NINE: To enable board members to "grow in their jobs", provide learning opportunities by:

- Orienting new board members individually and/or in small groups.
- Providing a board handbook.
- Providing educational presentations and training sessions -- invite staff to make presentations about the organization's programs, services,

constituency, provide information about the industry of which the organization is a part, train members in solicitation and advocacy skills, etc.

TEN: To increase leadership resources, identify and recruit a cadre of experts and organize them into an advisory council. This will provide a place for:

- Newly identified prospective board members to learn to love the organization while giving of their time and expertise in a more limited way.
- Moving a board member whose term has expired but still wants to be active. (Another role for this person -- keep as a member of a board committee.)
- "Fired" board members so that they can still feel a part of the organization without needing to make greater time and/or financial commitments expected of board members.

Implementing these ten ideas in a planned and organized manner and among people who are interested in building enduring relationships will strengthen your organization's capacity to serve its constituency and advance its mission.

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