



BOARD DO's and DON'Ts

What is the real work of philanthropic Boards? What should they engage in and what is not part of their roles and responsibilities? Let's take a brief look at some ideas to help these key stakeholders get a grip on their real work.

What Boards Should Do! There are numerous Board Roles and Responsibilities, which should be delineated in a Board job description. Here are some of the areas to focus on.

1. **Governance** includes those issues related to running an organization such as (a) planning (developing and monitoring long range and strategic plans, creating and reviewing the vision and mission, establishing and revisiting the statement of philosophy or institutional core beliefs); (b) finances (approving and monitoring the budget, identifying/determining resource development strategies); and (c) policy (establishing, reviewing and revising bylaws and all personnel, fundraising, programs/services and administrative policies). The work required to accomplish these governance tasks needs to be performed by Board members actively engaged on one of several board committees. That means that, in addition to attending Board meetings, Board members must be willing to spend time in committee meetings and doing independent projects.
2. **Fundraising** activities is an essential role for your Board. Naturally, the level of sophistication of your development program will determine the nature of the Board's involvement in fundraising. Regardless, a key role for Board members is in helping to identify and cultivate donors. Nonprofit organizations, with small or non-existent development staff, will need to have Board members play a more hands-on role than those Nonprofit organizations with larger staffs dedicated to fundraising activities. These hands-on activities may include planning and organizing special events and annual appeals, researching funders and writing grant proposals, doing bulk mailings, etc.
3. **Public Relations** activities will also vary by level of sophistication of the nonprofit organization. But, regardless of nonprofit organization size, all Board members have the obligation to be well-informed about the nature of the industry in which your particular nonprofit organization is involved, to serve as ambassadors for your nonprofit organization to the community and to be "sounding boards", representing the public perspective within

your nonprofit organization. In a small nonprofit organization, without dedicated development/PR staff, Board members, perhaps those with special expertise, may also do some of these “jobs”: writing press releases, ads and PSAs; being a speaker at community groups; helping to write a newsletter; and working on the ubiquitous mailings.

4. **Volunteering** is a role that Board members can and, in some instances are required to, play. There are Nonprofit organizations that, as a matter of practice, if not policy, require people to be volunteers before serving as Board members. In addition, they often require them to continue in this voluntary role while on the Board. Often, this volunteering involves specialized training, is directly related to advancing the mission through direct service and requires a consistent and ongoing commitment. Other volunteer roles, which Board members may voluntarily elect, include serving as a receptionist, running errands or taking inventory.

What Boards Don't Do! Here's a short list of what I believe Board members should not do.

1. **Manage day-to-day operations.** As a staff member, do you want someone breathing down your neck and second guessing your every move? One of the reasons that Boards put policies in place is to empower staff members to run the organization in a smooth and consistent manner.
2. **Provide direct service.** Yes, I know I just said that some organizations do require this. And in other instances, because you are in a financial bind you may accept the good intentions of a Board member willing to do some “office work”. The major concern I have here is that there be a clear understanding in place to separate the role of the volunteer from that of the Board member...in other words, the volunteer must remember what hat is being worn at all times. Otherwise, as staff charged with the daily operation of the agency, you may find yourself with Board members, no matter how well-meaning, trying to micro-manage your nonprofit organization.
3. **Hire, supervise and evaluate staff.** The Executive Director is the person who hires all staff unless he / she delegates that to other staff who manage specific areas of the organization. The exception to this is, of course, hiring, supervising and evaluating the Executive Director / Chief Executive Officer of the organization and that is a major role for the Board.
4. **Assign work to staff.** A major taboo is a Board member who assigns work to one of our already over-worked support staff members. Even if the work is for the organization, that support staff person's supervisor, and

not the Board member, must assign that work. And if it's not agency work, just forget it!!

5. **Officially represent the organization.** Someone must, most certainly, serve as spokesperson for your nonprofit organization. But just because someone is a Board member does not give him or her license to represent your nonprofit organization unless specifically assigned that duty.

6. **Gain personal favors and remuneration.** Yes, this is certainly one of those sticky wickets. To handle this controversial issue, Boards must put conflict of interest policies in place to ensure, among other things, that Board members reveal personal interests in specific issues and not receive fees for services performed on behalf of the organization. For example, as an organizational development professional, I have not and would not charge nor accept a fee for providing my expertise to an organization on whose Board I serve. Does this issue trouble you? Are there Board members who are getting paid by your nonprofit organization for providing their professional services? If so, you may want to examine their motivations for serving on the Board. There are certainly instances where funders have not provided grants when Board members are obtaining fees for services rendered. This is a very complex issue, one that you and your Board should be carefully examining.

© 1998, Susan L. Walling, CFRE; revised 2008 PhilanthropyWorks, LLC
Susan Lee Walling is President & CEO of PhilanthropyWorks, LLC. This article was initially published in Atterbury's Pennsylvania Nonprofit Report in November 1998.