



Spring 2012

Six Steps to Success for Super Board Engagement

Effectively engaging all board members is an ongoing process, but there are proven actions a nonprofit organization can take to set the stage for success. Luckily, these actions are not difficult or expensive to do. Follow these six steps and I guarantee that your organization's board members will do better at doing their job!

1. Conduct a Thoughtful and Considered Recruitment Process

- Assess the needs of the organization and recruit to fill those needs
- Establish a clear process for how recruitment happens – document it – and ensure that all board and appropriate staff members understand that process

2. Establish and Communicate Clear Responsibilities and Expectations of Board Members

- Be **specific** about what board members are expected to do
- Write these down – create a job description that includes specific expectations
- Share these with prospective board members **before** they are asked to join the board
- Ensure that they are understood and agreed to by all **current** board members as well
- Review annually and revise as necessary
- Establish and follow a process for giving board members ongoing feedback on how they're doing on meeting expectations

3. Provide Orientation/Education for New Board Members

Be sure to include:

- How the board operates and makes decisions
- Mission and programs of the organization
- Finances
- Fundraising and the board's role in it
- Conflict of interest policies
- Board buddy program

4. Establish Clear Understanding and Expectations About the Role of the Staff Versus the Role of the Board

- Strive for a positive working relationship between board chair and chief executive; they are the leadership team
- Generally speaking, board concentrates on the big picture issues, staff is responsible for day-to-day management

- Define role of staff members (other than chief executive) who interact with the board on committees; and define board's relationship to those staff members

5. Continually Develop the Board's Leadership and Knowledge

- Determine what training needs there are, and provide training during board meeting time
- Offer opportunities for board members to receive training outside of your organization
- Offer multiple opportunities for all board members to represent the organization – at meetings, receptions, as a speaker, etc.
- Hold an annual board retreat
- Engage the board in strategic planning

6. Engage Each Board Member in a Fundraising Role that Works for Him/Her

- Develop clear expectations of the fundraising role, with specific goals defined for each board member
- Offer multiple options on how a board member meets those expectations and goals
- Provide support from staff to help each board member meet fundraising expectations
- Provide training on fundraising on an annual basis, or more often if necessary

A couple of interesting websites:

For a very comprehensive version of a board training manual, called "Fundamentals of Effective Board Involvement" written by a Canadian organization, www.mentoringcanada.ca/training/boards/index.html

For lots of information pertaining to boards, www.boardsource.org – some of the material is only available to paid members of the organization, but there are also lots of free resources.

Christine Soto Consulting

Smart Solutions for Nonprofits and Foundations

www.christinesoto.com ▪ 2455 W. 37th Avenue, Denver, Colorado 80211 ▪ 303.477.2822 ▪ christinesoto@comcast.net

Christine Soto is a consultant specializing in organizational development of nonprofits and grantmaking services to foundations. Her career of 38-plus years in the nonprofit sector includes 12 years as an executive director and 9 years as a foundation executive. This article is from the Spring 2012 issue of *Soto's Smart Solutions*, available at www.christinesoto.com. You may feel free to use the content of this article, but please credit **Christine Soto Consulting** if you do so.