Bored with Nonprofit Board Development?

Five ways to Engage Your Board

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Session Objectives

✓ Learn what leads to positive nonprofit leader and volunteer board member working relationships.

✓ Understand the importance of board orientation, assessment, planning, fund raising, and future casting for succession.

✓ Increase knowledge and awareness regarding jumpstarting board activity.
Agenda

- 9:00 AM  Registration, breakfast, & networking
- 9:20 AM  Welcome and Introductions
- 9:40 AM  Role of the Board
- 9:50 AM  Board Orientation
- 10:15 AM Board Assessment
- 10:25 AM Succession Planning
- 10:40 AM Fundraising
- 11:00 AM Board/ED relationship
- 11:20 AM Q&A
- 11:30 AM ADJOURN
Who’s in the room?

1. Name

2. Organization

3. Biggest challenge your Board is facing right now
Lisa C. Burford, MNO
What is a Board supposed to do?
Role of the Board

• **Shape** the organization's mission and purpose.

• **Monitor** resources, programs, legal and ethical integrity

• **Improve** organization’s public standing

• **Lead** an organizational and governance planning process

• **Ensure** leadership and resources are stable
5 activities to engage your board

1. Board Orientation
2. Board Assessment
3. Succession Planning
4. The Board’s role in fundraising
5. The Board and Executive Director relationship
#1 Board Orientation

How do you orient your Board?
#1 Board Orientation

A. Roles and Responsibilities
   * See job description

B. Officers
   * See roles

C. Committees
   * See typical committees

D. Board manual
   * See index

E. Calendar
   * See sample
#2 Board Assessment

When was your last Board assessment?
#2 Board Assessment

- Facilitated discussion
- Annual event
- Report results
- Develop strategy for improvements
#3 Succession Planning

How many of you have a Succession Plan?
#3 Succession Planning

- Preparation for the inevitable departure of an organizational leader

- Needed for Board and Staff
  - *Who at your organization?*

- An important risk management tool

- An administrative commitment

- Revisit regularly
#4 Role in Fundraising

How do you involve your Board in fundraising?
#4 Role in Fundraising

- Ensure adequate resources:
  - Make a significant personal contribution
  - Draft, review, and/or sign grants/appeals
  - Host a fundraising event (Dinner, BBQ, yard sale)
  - Provide names and addresses of potential donors
  - Speak at events

- Be clear of expectations at the orientation
  - Dollar contribution?
  - Buy a table?
  - Make phone calls?

- 3 G’s
#5 Board/ED relationship

How often does the ED and the Board Chair meet?
#5 Board/ED relationship

- Critical success factor
- Must be groomed; not innate
- Build rapport in the beginning
  - Monthly meetings
  - Bi-monthly reports
  - Email or phone?
- Meet a few days before the Board meeting
Final Tips

1. Board members are people too
2. Board members are volunteers
3. Board members can be “fired”
4. Board members are giving of their “B” time
5. Board members need to receive something in return
THANK YOU!

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