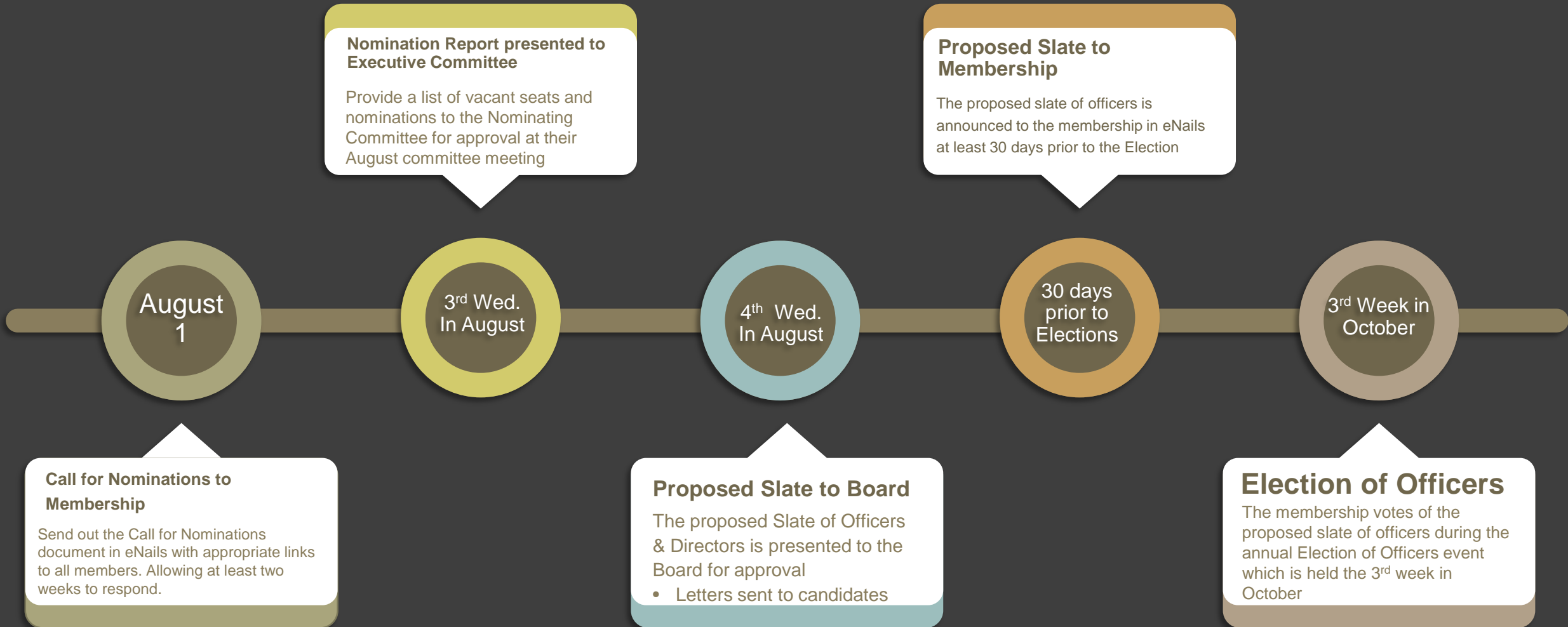


Board Nominations



BUILDING OUR BOARD TEAM

Step One: List who you want to serve. Who are the current or up-and-coming movers and shakers in your community and your sector?

Step Two: Determine accessibility. Do you currently have access to them? And if not, who can make the introduction? Is there another board member, a donor or a community leader who might be able to make the connection? Do you have mutual connections on LinkedIn that help you get the introduction?

Step Three: Identify that they truly care about your cause. Nothing trumps passion. Their passion is what will open the doors to their network, inspire them to make stretch gifts and keep them engaged.

Step Four: Make sure they can commit. Next to their passion for your cause, the single greatest predictor of your success with new board members is their clear understanding of the responsibilities of board service.

Step Five: Cultivate them if it's not the right time. Not every board prospect will be ready to commit when you are. Most won't. You've got to cultivate their engagement in your cause so you are next in line and able to move them to your board as soon as their commitment allows.

MAKE A LIST OF PROSPECTIVE BOARD MEMBERS . . . NOW WHAT?

1. Have them complete the Prospective Board Member Application.
2. Set up a time to interview them and provide them with some general information on the Association.

Six Questions to Ask a Potential Board Member

1. What are some of your prior board leadership experiences?
2. What skills, connections, resources and expertise do you have to offer and are willing to use on the behalf of the organization?
3. Do you have any worries or concerns about joining the board?
4. Do you have personal aspirations that could be enhanced by board service?
5. How much time a month can you commit to meetings and serving the mission?
6. What motivates you?

As you interview the potential board members, elaborate upon the opportunity and rewards of service. Be genuine when you discuss the support board members receive. Don't be tempted to downplay your expectations to recruit a noncommittal "big name" board member.

Try Before You Buy

While you may have taken the proper steps to vet potential members on the front end, there will be times when a board member simply isn't the right fit. So you might want to try someone out before making the commitment with a committee role first, whether a short-term ad hoc committee or a standing committee. Both you and your committee member get to try-on service and make sure it's a good fit for each of you before any appointment is made.

HOW TO "ONBOARD" NEW BOARD MEMBERS

Onboarding a new board member starts them off on the right foot with board service and sets the tone for a great tenure. They can start making an impact sooner, and it sets them—and the whole board—up for success. While it might be an obvious statement, it's important to remember that the overall effectiveness of a board member is directly connected with how intentional we are with integrating them into our organization.

Five Steps to Effective Onboarding

If you want to maximize your opportunity to onboard a new board member, here are five important steps to consider:

Step 1: Give them a 1:1 orientation. Ideally, this is done with the board President and the EVP at the organization's offices. It includes a tour, meeting the staff and sitting down to review the Board Handbook.

Step #2: Match them with a board buddy. Match your new board member with a seasoned member to help them adjust to the new role. Not only does this help your new board member get up to speed faster and eliminate feelings of intimidation being the new kid on the block, but it also satisfies one of board members' most common reasons for joining a board: socializing and networking with peers.

Step #3: Provide them with a board handbook. A comprehensive board handbook is a great tool to educate your members about the organization and empower them to serve. Some core components to include:

- Organizational information (staff resource document; annual event calendar, bylaws and budget)
- Board information (board contract, board roster, meeting schedule, current strategic plan, committee overview, chairs and members)
- Board policies

Step #4: Host a welcome reception. If you've got a new slate of board members joining at once, this is a great way to introduce them to the rest of the board, staff and leaders.

Step #5: Announce it publically. Send a press release announcing your new board members to your local newspaper and business journal. Most have an "On the Move" section, and this is a simple, free way to get publicity for your organization and your new board member.

Taking these steps will make a tremendous difference for your new board members. They will appreciate your efforts to get them acclimated to the board and their new responsibilities. And you'll notice the difference when they are quickly making a marked difference for your organization and mission.

Lead Your Board with Intentionality and Purpose

WHAT DO GREAT BOARD MEMBERS HAVE IN COMMON?

While you definitely want board members who are community and business leaders with significant giving capacity, the most important thing by far for your success is that board members have a clear understanding of their responsibilities as board members.

If you want to lead your board effectively, here are five common traits to develop and cultivate:

1. **They hold themselves and the organization accountable.** Board members should be constructive partners in achieving the organization's mission.
2. **They are genuinely passionate about the mission.** There is no substitute for passion. Passion trumps everything. Studies show that not only does passion rub off on others and increase their happiness levels, it is also one of the primary traits making leaders successful.
3. **They open doors to new donors and make a personal gift.** If your board members haven't given of themselves why should anyone else give?
4. **They are focused on fulfilling the mission and see the big picture.** It's easy for organizational attention to drift away from the mission but a strong board maintains a laser focus on fulfilling the mission.
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YORK BUILDERS
A S S O C I A T I O N

540 Greenbriar Road • York, PA 17404

Date

Dear _____,

York Builders Association will be electing ___ members to our Board of Directors. We are looking for board members who believe in our mission and are willing to be active in their governance roles.

Your name has been submitted to our Executive Committee as someone whose experience and involvement in the community would be an asset to our association, and we hope that you will consider becoming a nominee. We invite you to become part of our team as the building industry is entering a challenging and exciting time.

I have enclosed a copy of our board member job description. While we do ask that our board members play an active role, we pride ourselves on supporting each other as a team and believe that we offer an opportunity for our members to learn and grow with the association.

I would like to discuss this opportunity with you further and will be contacting you by phone to discuss our invitation and to answer any questions you may have. If, once we have spoken you wish to be considered, we will then ask that you complete our brief application form.

If you have any questions, please don't hesitate to contact me directly at (717) 793-8500, or our Executive Vice President, Laurie Lourie at (717) 767-2444.

Thank you in advance for your time and consideration.

Sincerely,

Immediate Past President and
Nominating Committee Chairperson

Our mission: To be the trusted resource for the building industry and our community.



Duties of Board Members

According to nonprofit corporation law, a board member should meet certain standards of conduct and attention to his/her responsibilities to the organization. These are referred to as the Duty of Care, the Duty of Loyalty, and the Duty of Obedience.

Duty of Care

Board members must exercise due care in all dealings with the organization and its interest. This includes careful oversight of financial matters and reading of minutes, attention to issues that are of concern to the organization and raising questions whenever there is something that seems unclear or questionable.

Duty of Loyalty

Conflicts of interest, including the appearance of conflict of interest, must be avoided. This includes personal conflicts of interest or conflict with other organizations with which a board member is connected.

Duty of Obedience

Obedience to the organization's central purposes must guide all decisions. The board must also ensure that the organization functions within the law, both the "law of the land" and its own bylaws and policies.

The board of directors is the policymaking body of the association and is responsible for the business affairs of the corporation.

Responsibilities and Authorities

- Approves operating and capital budgets
- Represents the membership of the association
- Understands issues facing the organization
- Ensures proper use of assets

Nominating Committee Role & Responsibilities

The Nominating Committee is comprised chaired by the Immediate Past President who will appoint three members to serve on the Committee.

The Committee will review the Nominating Committee Timeline and Procedures before accepting nominations and make any suggested changes to the Board for their approval.

Duties and Responsibilities:

- Identifies and presents potential board member candidates and explores with candidates his or her interest and availability in board service.
- Nominates individuals to be elected as directors of the board
- In cooperation with the board president, meets annually with each board member to assess his or her continued interest in board membership and term of service.
- Works with each board member to identify the appropriate role he or she might assume on behalf of the organization.
- Participates in the orientation of new board members.

Board Knowledge:

- Provides ongoing counsel to the board president and other board leaders on steps he or she might take to enhance board effectiveness.
- Periodically reviews and updates the board's policy guidelines and practices.

Board Leadership:

- Takes the lead in succession planning, taking steps to recruit and prepare for future board leadership.
- Nominates board members for election as board officers.

NOMINATING COMMITTEE



Nominations for Board of Directors Timeline & Procedures

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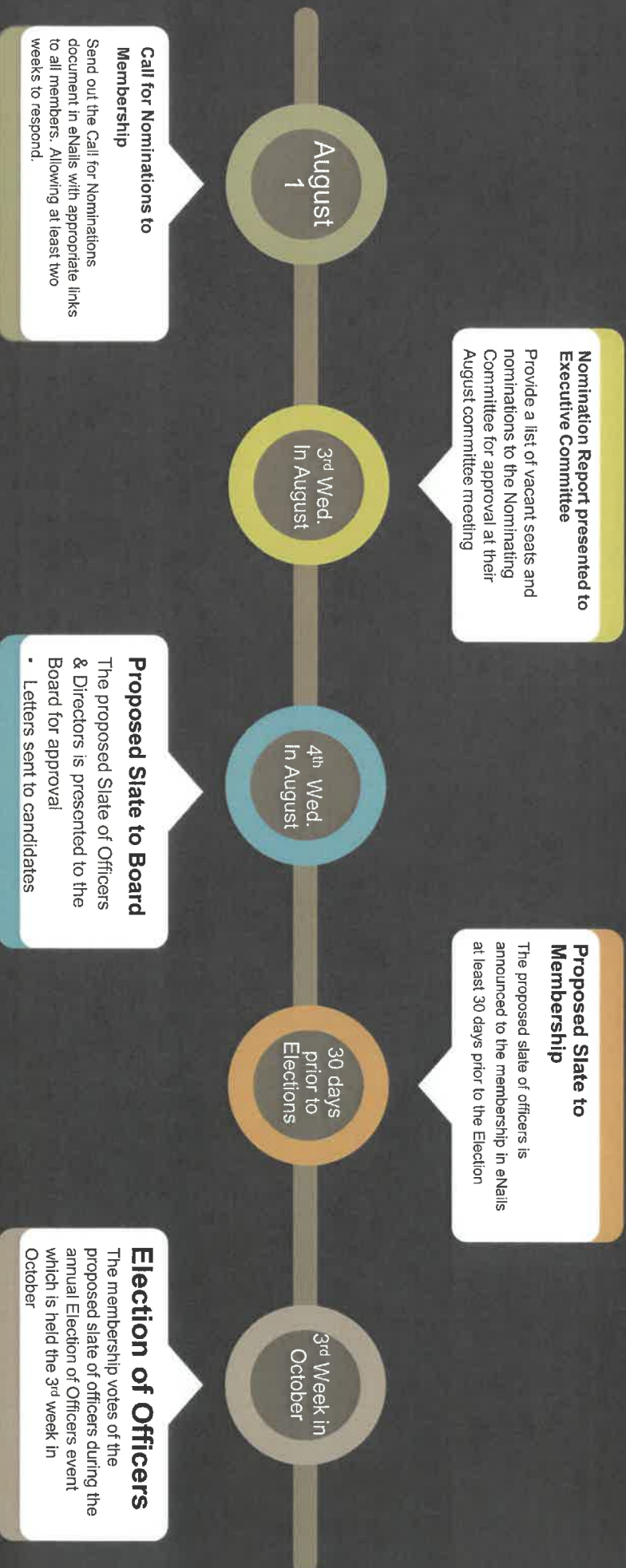
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The Nominating Committee and Board of Directors are pleased to invite nominations and applications for the York Builders Association's Board of Directors. Nominations and applications for the Board positions are due no later than August 31, 2019.

The York Builders Association is a non-profit organization chartered in 1964 and affiliated with the Pennsylvania Builders Association (PBA) and the National Association of Home Builders (NAHB). The mission of the York Builders Association is to be the trusted resource for the building industry and our community.

Available Positions

___ Board of Director positions are available in 20___. These seats represent members who will not be renewing their terms. Board members are elected for a two-year term.

Eligibility

All primary members of the York Builders Association in good standing who meet the qualifications outlined below are eligible to apply for Board of Director positions.

Current Board members whose terms are expiring are eligible for nomination.

Duties of a Board Director

The board of directors is the policymaking body of the association and is responsible for the business affairs of the corporation.

Responsibilities and Authorities

- Approves operating and capital budgets
- Represents the membership of the association
- Understands issues facing the organization
- Attend Board meetings and be an active member of the Association.
- Ensures proper use of assets

Requirements

YBA Board members are to serve a two-year term and actively participate in the monthly board meetings, serve on at least one committee, and pursue activities that advance the YBA mission and goals.

The York Builders Association's mission is to be the trusted resource for the building industry and our community.

The time requirement for Board members averages 3 hours per month. Board meetings are held the fourth Wednesday of each month.

Attend and participate in YBA events.

Selection Criteria

The Nominating Committee will evaluate applicants for open Director positions on the following criteria:

- Potential of applicants to serve YBA effectively, as reflected in their application materials and other evidence such as their description of interests in serving on the Board and the contributions the candidates think they can make, their specific goals for the YBA.

- Diversity of Board members is highly desirable, although there are no formal requirements.
- Diversity of institution type, location, size, focus, etc. is also highly desirable.

Nomination and Application

- If you are interested in serving as a Board member, please complete the online [application form](#) by **August 31**.

Selection and Voting Processes

The Nominating Committee and Board of Directors will review applications and present the nominees to the membership for a voting process according to the following schedule:

- **Annual Elections:** The proposed Slate of Officers will be presented to the membership before the annual elections held in October each year.
- A notice of the annual elections will be sent to the membership at least 30 days in advance of the meeting. Voting in accordance with the Bylaws.

Article VII. Voting, Proxies, and Quorums

Section 7.01 MEMBER VOTES. The voting privilege shall be limited as follows: **(a)** At meetings of the membership, Members in good standing shall have the right to vote. Firms, corporations or partnerships holding a Membership shall be entitled to one (1) vote to be cast by the duly designated representative listed on the association's membership roster.

Section 7.02 PROXIES. Votes may be cast by proxy in the following manner: **(a)** Any member entitled to vote, may, by an instrument in writing bearing a date not more than thirty (30) days in advance of the meetings and provided to the Executive Vice President, designate a director to vote for him/her in his/her place and stead at any meeting of the Board of Directors or Membership meeting.

- **Assume Duties:** Immediately following the Annual Installation of Officers in January: Newly elected Board members assume their duties.

Questions

Please contact Laurie Lourie, Executive Vice President, at laurie@yorkbuilders.com or (717) 767-2444 if you have any questions regarding the Board of Directors nomination, application, or election processes.

Website Links:

[DIRECTOR APPLICATION](#)

[YBA BYLAWS](#)

[DUTIES OF BOARD MEMBERS](#)



YORK BUILDERS
A S S O C I A T I O N

540 Greenbriar Road • York, PA 17404

Date

Dear _____,

York Builders Association will be electing ___ members to our Board of Directors. We are looking for board members who believe in our mission and are willing to be active in their governance roles.

Your name has been submitted to our Executive Committee as someone whose experience and involvement in the community would be an asset to our association, and we hope that you will consider becoming a nominee. We invite you to become part of our team as the building industry is entering a challenging and exciting time.

I have enclosed a copy of our board member job description. While we do ask that our board members play an active role, we pride ourselves on supporting each other as a team and believe that we offer an opportunity for our members to learn and grow with the association.

I would like to discuss this opportunity with you further and will be contacting you by phone to discuss our invitation and to answer any questions you may have. If, once we have spoken you wish to be considered, we will then ask that you complete our brief application form.

If you have any questions, please don't hesitate to contact me directly at (717) 793-8500, or our Executive Vice President, Laurie Lourie at (717) 767-2444.

Thank you in advance for your time and consideration.

Sincerely,

Immediate Past President and
Nominating Committee Chairperson

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Prospective Board Member Application

If you are interested in serving on the York Builders Association Board of Directors, please complete the information below and return to the YBA office by email to Laurie@yorkbuilders.com or mail to: York Builders Association, 540 Greenbriar Road, York, PA 17404

NAME: _____ COMPANY: _____

TITLE: _____ MEMBER SINCE: _____

PHONE: _____ CELL: _____ EMAIL: _____

Special Skills

- | | | |
|--|---|---------------------------------------|
| <input type="checkbox"/> Fund Raising | <input type="checkbox"/> Marketing/Public Relations | <input type="checkbox"/> Technology |
| <input type="checkbox"/> Event Planning | <input type="checkbox"/> Finances | <input type="checkbox"/> Legal |
| <input type="checkbox"/> Personnel/Human Resources | <input type="checkbox"/> Business Management | <input type="checkbox"/> Other: _____ |

Special Interests – Hobbies: _____

Are you available to regularly attend board meetings on the fourth Wednesday of each month from 5 pm to 6:30 pm?

- Yes No

Which YBA Committee(s) do you currently serve on: _____

Other affiliations: _____

Other board service: _____

York Builders Association
Prospective Board Member Application

Please briefly describe your reason for your interest to serve on the board: _____

What makes our mission meaningful to you? _____

The York Builders Association's mission is to be the trusted resource for the building industry and our community.

Do you have any concerns about joining the board? _____

Is there anything you think you would need from our association to make your experience as a board member a successful one for you? _____



Send via email immediately following Board Meeting in September and before the Proposed Slate of Officers notification to membership.

(Date)

Dear _____

For the first time in recent history, we had many nominations for the open Board positions!

Thank you for your interest; however, after careful consideration the committee has moved forward with other candidates.

We were impressed with your experience and credentials and look forward to your continued involvement and support.

With best wishes,

20__ Nominating Committee Chair
York Builders Association



*Send via email prior to releasing the Proposed Slate of Officers to Membership
Verify links to Elections and Member Breakfast and Installation are current and correct*

(Date)

Dear (Name),

Congratulations! The Board of Directors of the York Builders Association has approved your nomination to stand for election for a Director position.

On *September 27th*, we will announce the slate of candidates to the membership via email.

The membership will vote on the *2020* Proposed Slate of Officers during our annual Elections and Member Breakfast to be held on *Tuesday, October 29, 2019 at 7:30 am at the Wyndham Garden in York*. For details and registration go to [Elections and Member Breakfast](#).

Once elected by the membership, you will be sworn in as an officer during the 2020 Installation of Officers which will be held *Thursday, January 9, 2020 at the Great American Saloon in Red Lion*. For details and registration go to [2020 Installation of Officers](#).

You will be required to attend the Board meetings held the 4th Wednesday of each month starting on *January 22, 2020*. All Board meetings start at 5:00 pm and are held at the York Builders Association located at 540 Greenbriar Road in York.

Please let me know if you have any questions about the process. On behalf of all the Board Members, we sincerely appreciate your willingness to stand for election and serve on the Board of Directors of the York Builders Association.

Congratulations again, and I look forward to working with you.

2019 Nominating Committee Chair
York Builders Association

MEMBER NEWS



YBA 2020 SLATE OF OFFICERS

Dear Member:

The Nominations Committee, chaired by Jason Barshinger, is pleased to present the membership with the following proposed slate of Officers and Directors for the 2020 term.

The 2020 Slate of Officers will be voted on at the October Members Breakfast & Leadership Election on October 29. [Click here to RSVP](#)

Please reach out to me at laurie@yorkbuilders.com or (717) 767-2444 if you have any questions.

Sincerely,

Laurie Lourie
Executive Vice President

YORK BUILDERS ASSOCIATION

PROPOSED 2020 BOARD OF DIRECTORS CHART

Our mission is to be the trusted resource for the building industry and our community.

NICK SABOLD 2020 PRESIDENT		JASON BARSHINGER PRESIDENTIAL ADVISOR	
BRANDON KNAUB VICE PRESIDENT	DR. TERESA GREGORY SECRETARY & TREASURER	ANDREA BLEDSOE ASSOC. VICE PRESIDENT	SHONNA CARDELLO MEMO. VICE PRESIDENT
BUILDERS	ASSOCIATES	STATE & PRES.	STATE LIFE DIRECTORS
STEVE KOHR - 2020 KOHR & SONS	DAVID SMITH - 2020 MYERS BUILDING PRODUCT SPECIALISTS	NICK SABOLD PRESIDENT	SHONNA CARDELLO WHITE ROSE SETTLEMENT SERVICES
RICHARD KRILL - 2020 WOODLAND DEVELOPMENT	CHRIS GIBSON - 2021 YORK BUILDING PRODUCTS	DIRECTORS TODD FISHER FISHER CONSTRUCTION	LARRY MELLOTT START LIVING HOMES
BETSY STEIN - 2021 K D ROSEGRANT BUILDING & REMODELING	DUANE MOYER - 2021 RKL	BARRY STRINE STRINE'S HEATING & A/C	MACK SMITH M L SMITH & SON BUILDERS
JOE MILLER - 2021 J. E. MILLER SERVICES	TRUST TRUSTEE	BRANDON KNAUB CAMEO SERVICES	PAUL DELLER RED OAK REMODELING
DAWN LINKE - 2021 BERKS HOMES	BARRY STRINE STRINE HEATING & A/C	ANDREA BLEDSOE PRINT-O-STAT	NATIONAL DELEGATES
TAMMY WAGMAN - 2021 JEFFREY L. HENRY GENERAL CONTRACTOR		DAVID SMITH MYERS BLDG. PRODUCT SPECIALIST	RICHARD KRILL WOODLAND DEVELOPMENT
		ALTERNATE DIRECTORS DR. TERESA GREGORY YORK TRADITIONS BANK	VACANT POSITION PAUL DELLER



Send out immediately following the Elections and Member Breakfast.

(Date)

Dear (Name),

Congratulations on your election to the York Builders Association Board representing 385 member companies.

Your two-year term will begin on January 22, 2020 and run through December 31, 2021 – but don't worry! You won't have any immediate duties. In fact, it will be our first duty to orient you to board member responsibilities. The Board Orientation will take place prior to the January 22nd Board Meeting at 4:30 pm at the York Builders Association office. In the meantime, if you have any questions regarding your role and responsibility as a Board Member, please feel free to reach out to myself or our Executive Vice President, Laurie Lourie, at 717 767-2444 or Laurie@yorkbuilders.com.

On behalf of the nominating committee and current Governance Board members, we welcome you to your new role in serving our continually growing York Builders Association community.

Yours sincerely,

2020 President of the York Builders Association



Our Mission: To be the trusted resource for the building industry and our community

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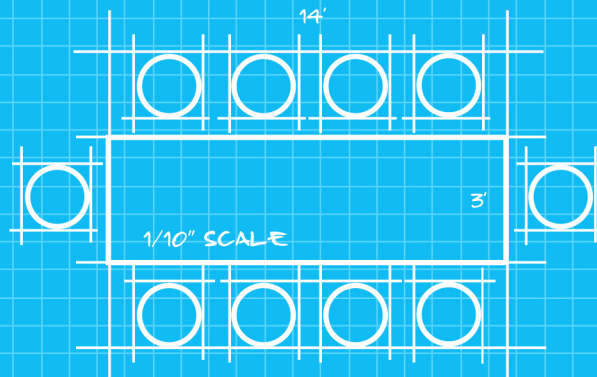
Is there anything you think you would need from our association to make your experience as a board member a successful one for you? _____

.....

THE ULTIMATE GUIDE TO

BUILDING YOUR BOARD

.....



50

Tips, Tools, and Ideas to Develop
a Powerful Nonprofit Board

RACHEL MUIR
Vice President, Training Services

PURSUANT 

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INTRODUCTION:

The Board Your Nonprofit Needs

Few things are more critical to your nonprofit's health, success and sustainability than an effective board of directors. Your board can make or break your nonprofit's success. That's why it's crucial to gather the right people for the task.

For many nonprofits, the board is merely a formality, giving very little tangible or consistent assistance. Nonprofits in that situation are missing out on crucial leadership and exposure. If that's the state of your nonprofit today, don't give up hope! With this guide, you can create the board you need.

Recruiting, building, managing and engaging a leadership team made up solely of volunteers is one of the most ambitious, delicate and daunting responsibilities a CEO or executive director will have. To build a board you can be proud of, you need to consider the type of people who can champion your nonprofit's mission—and then seek them out.

Where do you start?

In the next few pages, we'll walk through everything your nonprofit should know when it comes to building, leading and equipping your board.

If you're ready to build a powerful nonprofit board that plays a valuable role in achieving your organization's mission, let's get started...

STEP 1:

Build a Board You Can Be Proud Of

When we think about having a great board of directors, it can be tempting to fantasize about having lots of big-name powerhouses who could write large checks. Although the money would be nice, in reality, these people may have no real connection to your cause—and money can't cover that gap.

The ABCs of donor prospecting—access, belief and capacity—all apply to board recruitment. You need to have **access** to these individuals. They need to **believe** in your cause. And while we typically think of **capacity** as their giving potential, instead consider it as a board prospect's availability to commit time and talents to your organization.

Other qualities to search for in a board member include a willingness to engage, personal connection to your cause, network of key contacts, capacity to give, prior board experience and specialized expertise.

HOW TO BUILD AN A-TEAM BOARD

How do you make it happen? Here are five steps to an A-team board:

Step One: List who you want to serve. Who are the current or up-and-coming movers and shakers in your community and your sector?

Step Two: Determine accessibility. Do you currently have access to them? And if not, who can make the introduction? Is there another board member, a donor or a community leader who might be able to make the connection? Do you have mutual connections on LinkedIn that help you get the introduction?

Step Three: Identify that they truly care about your cause. Nothing trumps passion. Their passion is what will open the doors to their network, inspire them to make stretch gifts and keep them engaged.

Step Four: Make sure they can commit. Next to their passion for your cause, the single greatest predictor of your success with new board members is their clear understanding of the responsibilities of board service. Too often we fail in this regard. Eager to fill a vacant seat or secure a well-known name, we fail to clearly communicate expectations of service, especially fundraising expectations, and we end up with a recipe for churn and failure.

Step Five: Cultivate them if it's not the right time. Not every board prospect will be ready to commit when you are. Most won't. You've got to cultivate their engagement in your cause so you are next in line and able to move them to your board as soon as their commitment allows.

Keeping the ABCs of donor prospecting in mind as you take all these steps will help you build the powerhouse board you need with A-Team members who will make your nonprofit successful.

YOU HAVE PROSPECTIVE BOARD MEMBERS . . . NOW WHAT?

Let's say your organization has identified a strong board prospect. You've taken some key next steps to further engage them in your mission and you're ready to discuss board service. Congratulations! The stage you are in right now is a lot like being on a job interview, and you need to remember the old adage: interview them as much as they are interviewing you.

Ten Questions to Ask a Potential Board Member

So what kind of questions do you need to ask them? Here are ten questions you can (and should) ask every prospective board member:

1. What makes our mission meaningful to you?
2. What are some of your prior board leadership experiences?
3. What skills, connections, resources and expertise do you have to offer and are willing to use on the behalf of the organization?
4. Do you have any worries or concerns about joining the board?
5. Do you have personal aspirations that could be enhanced by board service?
6. How much time a month can you commit to meetings and serving the mission?
7. What motivates you?

8. What are your expectations from the management of the nonprofits where you've served as a board member?
9. Are you willing to make a financial commitment that is a stretch?
10. How important is socially interacting with other members?

Five Things Potential Board Members Should Be Asking You

By the same token, you should be prepared for your prospective board member to ask you some critical questions too! They may ask about the board's weaknesses, what your expectations are and what makes your organization unique. Below are some questions you want to be able to answer about the organization.

1. **Who is on the board now?** How did they get there?
2. **How long are the terms?** How many people are required for a quorum?
3. **What committees exist?** Who is on them? Are they active?
4. **What do the financial statements look like?** What is the annual operating budget? What are the top revenue streams and the largest expense categories? Is there a deficit? Does the organization have an annual audit and has it consistently been in good standing? Are there any outstanding legal issues going on with the agency?
5. **What are the responsibilities of board members?** Is the board well staffed with an existing leadership who are eager and capable of moving into new leadership roles on the board?

As you interview the potential board members, elaborate upon the opportunity and rewards of service. Be genuine when you discuss the support board members receive. Don't be tempted to downplay your expectations to recruit a noncommittal "big name" board member.

A Good Rule of Thumb: Try Before You Buy

While you may have taken the proper steps to vet potential members on the front end, there will be times when a board member simply isn't the right fit. So you might want to try someone out before making the commitment. There are lots of meaningful ways for folks to leverage their engagement, support your organization and bring in more donors without occupying a board seat.

Traditionally, organizations have placed these individuals in a perpetual parking spot known as the “advisory board,” which is reserved for big name individuals who don’t have the willingness or capacity to serve on the board. Their names appear on the letterhead but other than receiving an annual report there is little interaction. Organizations are better served engaging with these individuals strategically to leverage their networks to widen the organization’s circle of friends. A great example of this is a Leadership Council where members commit to an annual gift amount of \$2,000 and to bringing 25 individuals into the organization to experience its events or programs.

Another great solution is to test someone interested in board service with a committee role first, whether a short-term ad hoc committee or a standing committee. Both you and your committee member get to try-on service and make sure it’s a good fit for each of you before any appointment is made.

HOW TO “ONBOARD” NEW BOARD MEMBERS

Onboarding a new board member starts them off on the right foot with board service and sets the tone for a great tenure. They can start making an impact sooner, and it sets them—and the whole board—up for success. While it might be an obvious statement, it’s important to remember that the overall effectiveness of a board member is directly connected with how intentional we are with integrating them into our organization.

Five Steps to Effective Onboarding

If you want to maximize your opportunity to onboard a new board member, here are five important steps to consider:

Step 1: Give them a 1:1 orientation. Ideally, this is done with the board chair and the CEO or ED at the organization’s offices. It includes a tour, meeting the staff and sitting down to review the board contract.

Step #2: Match them with a board buddy. Match your new board member with a seasoned member to help them adjust to the new role. Not only does this help your new board member get up to speed faster and eliminate feelings of intimidation being the new kid on the block, but it also satisfies one of board members’ most common reasons for joining a board: socializing and networking with peers.

Step #3: Provide them with a board handbook. A comprehensive board handbook is a great tool to educate your members about the organization and empower them to serve. Some core components to include:

- Organizational information (case statement, current newsletter, staff roster, program overview, development plan, bylaws and budget)
- Board information (board contract, board roster, meeting schedule, current strategic plan, committee overview, chairs and members)
- Meeting materials (schedule of meetings, agendas and minutes)

Step #4: Host a welcome reception. If you've got a new slate of board members joining at once, this is a great way to introduce them to the rest of the board, staff, donors, clients and community leaders.

Step #5: Announce it publically. Send a press release announcing your new board members to your local newspaper and business journal. Most have an "On the Move" section, and this is a simple, free way to get publicity for your organization and your new board member.

Taking these steps will make a tremendous difference for your new board members. They will appreciate your efforts to get them acclimated to the board and their new responsibilities. And you'll notice the difference when they are quickly making a marked difference for your organization and mission.

STEP 2:

Lead Your Board with Intentionality and Purpose

When we think about cultivating great board members, most people think about big names and big wallets. But there's a lot more that goes into a great board member, such as a connection to your cause, the ability to give, prior board experience, a strong network of key contacts and an area of specialization, knowledge or influence that could help the organization.

WHAT DO GREAT BOARD MEMBERS HAVE IN COMMON?

While you definitely want board members who are community and business leaders with significant giving capacity, the most important thing by far for your success is that board members have a clear understanding of their responsibilities as board members.

If you want to lead your board effectively, here are five common traits to develop and cultivate:

- 1. They hold themselves and the organization accountable.** Board members should be constructive partners in achieving the organization's mission.
- 2. They are genuinely passionate about the mission.** There is no substitute for passion. Passion trumps everything. Studies show that not only does passion rub off on others and increase their happiness levels, it is also one of the primary traits making leaders successful.
- 3. They open doors to new donors and make a personal gift.** If your board members haven't given of themselves why should anyone else give?
- 4. They are focused on fulfilling the mission and see the big picture.** It's easy for organizational attention to drift away from the mission but a strong board maintains a laser focus on fulfilling the mission.
- 5. They ask tough questions.** Great board members provide perspective, ask for updates from the field and offer objective analysis to support and expand your staff's reach and impact. They don't shy away from thoughtful questions such as: "Are we spending and raising money according to plan?" They're also open to self-reflective questions about the value the board is contributing to the organization.

These traits make a board member invaluable to the organization. But such members are made, not born—***you can develop great board members through training and coaching.***

Use these traits to help your board members grow into a powerhouse team that will make a significant difference for your organization's mission.

Your powerhouse board members are likely leaders in their organizations, community and churches. These are exactly the people you need to make your organization a success!

FIVE SIMPLE WAYS TO INSTANTLY IMPROVE YOUR NEXT BOARD MEETING

Do your board members a favor: Shake up your board meeting format to energize your members and help them engage for the good of your organization. Here are five ways you can change your next meeting:

- 1. Take a 5-minute break to call donors to thank them for their gifts.** Your donors perceive your board to be the highest form of leadership and authority in your organization. At every board meeting, take a five-minute thank-a-thon break and give each board member a handful of donors to call. Be sure to list gift amounts and any background information that will help your board members connect with the donor. Include a few sample lines of what to say in the call. Then sit back and let the magic happen! Not only will this make your board members feel the joy of fundraising and dramatically increase their connection to donors, but this also has an overwhelmingly positive impact on donor retention.
- 2. Include a short personal testimony from a client or have a staff person describe a day in on the front lines.** Hearing a personal story of how your organization made a difference recently fuels your board members' passion for the cause and gives them a toolkit of powerful stories from the front lines to share on fundraising visits.
- 3. Have a board member describe the mission and why it's meaningful to them.** This reconnects your board members with why they are serving and inspires everyone in the room. Encourage your board members to share an accomplishment they're proud of. It is a great way to spotlight their engagement with your organization and let them do the talking.
- 4. Throw out Robert's Rules of Order.** Your board is not a parliament. Don't be afraid to have simple voting when you need to and ditch the formalities. Create agendas driven by goals

and outcomes. Board members get tired of the same old committee reports, motions and votes. Change it up to be outcome driven.

- 5. Make time for strategic conversations.** Plan a board retreat for an extended time to tackle an interesting item you've wanted to explore. Split board members into small groups or pairs to tackle the problems and report their findings.

You could even dedicate one board meeting to discussion by splitting your board members in pairs to develop solutions and reconvene to share ideas. Try tackling one topic each meeting or every other meeting.

Another idea might be to host a fireside chat with the CEO. Set aside 10 minutes for the board to interview the CEO about what is on their minds, what they are most excited about or what's keeping them up at night.

By implementing these ideas, you'll freshen up your typical board meeting. Your members will appreciate the new approach. The effectiveness of their efforts will multiply for the good of your mission and those you serve.

STEP 3:

Equip Your Board to Become Fundraising Superheroes

On the scale of top fears harbored by the general public, fundraising is near the top of the list. I'd say that's about right. Ninety-nine percent of the nonprofit professionals I meet are frustrated by their board's unwillingness to raise money. After 20 years in this industry, I have only met one person who boasted that she had a strong fundraising board.

FIVE REASONS WHY YOUR BOARD IS NOT FUNDRAISING

Do you ever think about why your board members don't want to fundraise? Here are five reasons:

- 1. They believe that's the only reason you asked them to serve.** Without the right expectations and training, your board members might feel like their primary role is to ask people in their sphere of influence for money. The last thing you want is for board members to feel like you're using them for their monetary connections.
- 2. They're afraid to make the ask.** Some board members are natural salespeople. Others, however, might find asking for money difficult because they don't know what to say or feel like they're begging people to support your organization.
- 3. They lack information or insights to help them.** Many board members lack ability to fundraise because they don't feel confident talking about the organization, its mission or the programs.
- 4. They worry they will be rejected.** What happens if they put themselves out there and get a no? Some board members might be afraid to fundraise because they're afraid of feeling like a failure if someone rejects their request.
- 5. They lack the right perspective.** Some board members might feel they are doing something terrible by putting a donor on the spot and in the hot seat. They forget that the ask they are ultimately making isn't for you or the organization, it's for the person whose life will be impacted through your organization.

These are the reasons why fundraising is the “f-word” to many board members. But there is one solution to each of these fears: **You**. As nonprofit leaders or professional fundraisers, it’s our responsibility to set board members up to win.

HELP YOUR BOARD MEMBERS OVERCOME THEIR FUNDRAISING FEARS

How we invite our board members to be a part of fundraising is everything. Consider your invitation. Asking a stranger to open up their wallet and write a check can sound scary. Spending quality time getting to know a community leader, or entrepreneur, and what they are passionate about sounds like a lot more fun.

The first step in getting board members to be excited about fundraising is framing it the right way. Here are five ways to help board members overcome some of the awkwardness and fear:

1. **The world is full of generous people who want to give.** For proof they need not look any further than the recent ALS Ice Bucket challenge.
2. **95% of fundraising is cultivation.** The ask is the shortest part and literally takes minutes. Help your board members keep from being overwhelmed.
3. **Donating money is a pleasant experience that feels joyous to the giver.**
4. **Remind them that they are just sharing their passion.** They are just trying to help make the world a better place.
5. **Being asked makes donors feel important.** Remind your board members that being asked to give isn’t always a nuisance.

HOW TO TURN BOARD MEMBERS INTO FUNDRAISING SUPERHEROES

Once you’ve helped board members overcome the initial shock of fundraising, it’s time to turn them into fundraising superheroes. Here’s how:

1. **Cultivate them just like you would a major donor.** Your board members can be one of the most valuable assets for your organization if you treat them that way.
2. **Get them up close to the mission to see and feel it in action.** When your board members see the impact your organization firsthand, they gain a whole new perspective and purpose when it comes to asking others to support your cause.

3. **Give them meaningful, tangible work.** Empower your board members to become a significant part of your development strategy. However, you don't want to put too much on their plate. A good rule of thumb is to never have more than three donor prospects to manage at a time.
4. **Make them feel like active contributors.** Let them be the heroes of your story.
5. **Build their confidence in fundraising.** One simple way to do this is by having them make phone calls to thank donors personally for their gift.

The winning formula is simple: Board members feel connected + they get inspired by your work and your need = they want to have an impact and engage others.

CONCLUSION:

Make Your Dream Board a Reality

It's time for your nonprofit to benefit from a powerhouse board of directors. Assessing the type of board members you need, and then actively seeking them out, will help you begin to build a board you can be proud of. But just gathering the right people isn't enough—they need to be coached. If you invest in them intentionally and purposefully, your board will conquer their fundraising fears and become fundraising superheroes.

This is your dream board! And you can make that dream a reality by implementing the tips, tools and ideas provided here. With a bit of work and dedication on your part, you can have the board of directors you've always wanted—and your nonprofit has always needed for its greatest success.

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Contact us to discuss your organization's fundraising needs.

About the Author



RACHEL MUIR serves as Vice President, Training Services at Pursuant. An expert consultant, trainer and presenter with over 20 years' fundraising experience, Rachel's career spans launching and running successful nonprofit organizations, leading an online fundraising consulting practice and managing major gift portfolios for some of the country's largest and most successful nonprofit brands.

When Rachel was 26 years old, she launched *Girlstart*, a nonprofit organization to empower girls in math, science, engineering and technology in the living room of her apartment with \$500 and a credit card. Several years later she had raised over 10 million dollars and was featured on *Oprah*, CNN and the *Today Show*.

You can connect with Rachel on [Twitter](#), [LinkedIn](#) or by visiting our training center, [Pursuant Labs](#).

Recommended Resources



sample board contract

YOUR ORGANIZATION'S NAME HERE

Board of Directors Contract

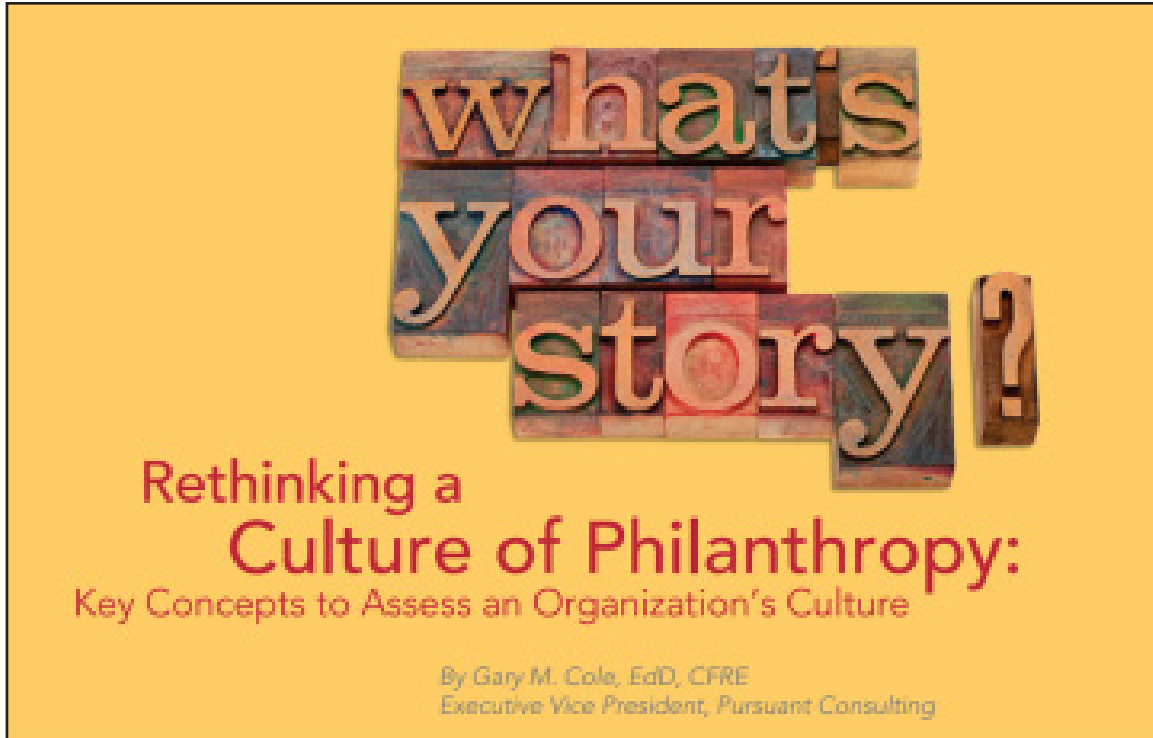
Your Organization's Name Board of Directors assists with fundraising each year through personal gifts as well as through relationship development with potential donors. In addition, Directors play an important role in extending Your Organization's Name connections by assisting with welcoming participants of programs and events.

Please use the enclosed forms to indicate what actions you will take to give/get funds and participate in events to support our work this year.

- A. Individual Gifts**
- B. Fundraising**
- C. Program Attendance**
- D. Committee Participation**
- E. Director's Signature**

Please return completed packet no later than _____

Recommended Resources




**what's
your
story?**

**Rethinking a
Culture of Philanthropy:**
Key Concepts to Assess an Organization's Culture

By Gary M. Cole, EdD, CFRE
Executive Vice President, Pursuant Consulting

It's not uncommon for fundraising practitioners to speak of the *culture of philanthropy* that exists within their organizations. The term itself has become quite popular in recent years. However, what is uncommon is an ability to collectively articulate what exactly the phrase means, how it looks, how it should be measured, and how those whom the organization serves may benefit from such a culture. As catalysts for change, development professionals have perhaps the best vantage point to view the entire organization. But in order to affect change and help create a philanthropic culture, an understanding of organizational culture is first needed.

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