

How to Be an Effective Board Member

When you join a non-profit board, you have an exciting opportunity to help guide the organization toward fulfilling its social mission and to learn how non-profit governance works. Board membership also requires a significant commitment of time and energy to fulfill its necessary obligations and responsibilities.

Here are some useful guidelines to keep in mind to ensure that you can be effective in this role.

1. Know the Mission and Set a Strategic Direction

- **Create a mission statement.** Every organization should have a clear, well-defined mission that sets the direction for everyone, from board to executive director to staff. The mission statement should define the organization's goals, means, and constituents, and what makes the organization unique and necessary to pursue these. In short, it should define why the organization exists. It should be prominently stated on written and online materials. The board should periodically revisit the mission to ensure that it is accurate and achievable.
- **Develop a strategic direction.** The board should set a strategic direction for the pursuit of its mission. This should set the framework for all other policies and decisions, from budget allocations to programs to organizational structure and staffing, even to the composition of the board itself. The board should also periodically revisit and redefine the strategic plan to ensure it fully aligns the organization in pursuit of the mission.

2. Select, Support and Guide the Executive Director and Staff

- **Hire the executive director.** The board implements its strategic agenda by hiring a suitable executive director, when necessary, and then giving them the support to build the staff and run the programs. It is important to consider diversity when seeking out for this position as the organization's leadership should reflect the community served.
- **Support the executive director.** The board should build a relationship of support and trust with the executive director. The executive director should feel comfortable bringing bad news or problems to the attention of the board.
- **Let the executive director do the job.** The board should provide the executive director with enough space to carry out the job without interference or micromanagement.
- **Hold the executive director accountable.** At the same time, the board is responsible for ensuring that the executive director meets the highest possible ethical, legal and financial standards. The board should provide confidential channels for staff and constituents to raise concerns about executive behavior. In rare cases, the board may need to step in to protect staff and the organization by reining in or even dismissing an executive director who behaves improperly.

3. Prepare, Ask Questions, and Listen at Board Meetings

- **Study the subject matter.** Preparation, collectively and individually, is essential to a productive board meeting. Board members must read in advance not only all introductory and general materials on the organization, but all documents and reports created and distributed for the board meetings.
- **Set and keep an agenda.** The board should create a comprehensive agenda reflecting all the strategic priorities of the foundation and then adhere to it.
- **Ask questions.** The board should ask as many questions as necessary to fully understand both the issues and the information that they are presented.
- **Listen.** An effective board will encourage questions from everyone present and will seek to hear out and consider all points of view.
- **Seek understanding before consensus.** A board that reaches consensus too quickly may be overlooking important complexities or questions. A board that frequently reaches quick consensus may need more diverse points of view.
- **Use technology to enhance outreach and effectiveness.** Boards should always be on the lookout for technological advances—such as videoconferencing—to improve attendance and make board participation possible for those whose physical abilities would otherwise make participation impossible.

4. Act as an Ambassador and a Fundraiser

- **Raise the organization's profile.** Public, private and online events all offer opportunities to spread the word on the important work that the organization conducts. Blogs, social media posts, published articles and speeches are all important ways to raise the salience of this work.
- **Consider the organization's reputation alongside your own.** Board members of course remain free to express their own opinions independent of the organization, but they must be careful not to associate those opinions with the organization if they are not part of official policy, and members should consider the effect their words might have, even indirectly, on the organization's ability to carry out its mission. In the age of social media, controversy can spread fast and wide.
- **Recruit new board members.** Board members should consider the overall composition of the board and identify any gaps that need to be filled to help the organization achieve its goals. Board members can leverage their network to identify potential board candidates keeping in mind the need for diverse backgrounds and skill sets.
- **Fundraising.** Board members should consider the organization's financial health a top priority, and they should demonstrate their commitment both by donating, according to their financial ability, and by encouraging friends, family, and associates to do likewise. Board members should also have a clear understanding of the board's "Give or Get" commitment where each member is responsible for meeting a certain threshold for giving and/or raising funds.

Please feel free to contact your Relationship Manager or the Donor Relations Team at donorrelations@calfund.org if you have any questions. We are here to help.

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