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# Volunteer Recruitment & Retention Playbook

*December 2013*

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## Executive Summary

Volunteers are the lifeblood of all professional associations. This playbook is all about volunteers - how to engage them, recruit them, motivate them, develop them and recognize them. Findings and tips from several respected association management publications are shared throughout. The addendum includes samples that each chapter can easily adapt and implement.

## ASAE's Decision to Volunteer - Key Findings

In 2008 the American Society of Association Executives (ASAE) published *The Decision to Volunteer*, which explored why individuals give their time and how associations can engage them. The findings were based on the survey responses of more than 26,000 association volunteers.

The study and its analysis yielded numerous key findings, among them:

- Association members are highly engaged people - They volunteer more than national levels and for more organizations. However, they reserve most of their volunteer hours for community organizations, not for associations. Turnover among association volunteers is high. There are many competing opportunities to volunteer so associations will have to work hard to get their attention.
- Values drive volunteer choices - While association members still expect career benefits from their professional volunteering, they are also interested in volunteering for reasons bigger than themselves, especially to build a stronger profession.
- The power of the direct ask - The top methods by which members were recruited into volunteer activities were through participation in chapter or annual meetings, and through a request by staff or other volunteers. Passive recruitment techniques such as web site postings, were not nearly as effective as more direct approaches. Volunteers respond best when approached directly with meaningful tasks.
- A meaningful experience keeps them coming back - As busy professionals, association volunteers expect a chance to work with like-minded people, network, keep skills sharp or learn a new skill, pass on their knowledge, and contribute to a cause they believe in. Above all, people who volunteer for associations expect to be involved effectively. Volunteer expectations vary according to where members are in their careers. One size will not fill all, and associations must design flexible and multiple volunteer activities for their members.
- Involving the younger generations - Although younger generations are slightly less engaged than older members, and are likely to volunteer differently, they actually believe more strongly in the importance of volunteering. The challenge for associations will be in finding meaningful and substantive ways to involve these less experienced but eager young professionals.
- Promote the professional benefits of volunteering - Two thirds of the survey respondents said they look for opportunities to connect volunteering to their professional work. There was a strong connection between the number of hours they volunteered and their satisfaction with professional volunteering. In fact, many regard volunteering as a benefit of membership; they see the association volunteer work they have done as something that has made them better professionals.
- Recognize the "ad hoc" volunteer - The study suggests that most association volunteers are performing low-profile services such as mentoring, membership recruitment, technical writing, or activities that might be further off the radar screen for association staff and leaders. The risk is in assuming that these ad hoc volunteers require less attention. Staff and board members should find ways to identify, support and acknowledge all volunteer contributions.

- Organizational strategies can support or discourage volunteering - Many of the reasons respondents gave for why they did not volunteer for their professional association are within the organization's power to address. The number one reason they did not volunteer was a lack of information about the opportunities. Other addressable issues included poor follow-through with volunteers, forgetting to thank them, poor communication, lack of support or training, unclear roles and high transportation expenses.

*Volunteer Functions Inventory (VFI)*

The survey asked respondents to indicate, regardless of their previous volunteer experience, how important/accurate the following statements are in doing volunteer work?

<i>* The VFI Compares volunteers according to what they believe they gain through volunteer work. Mean shows the average rating on a 1-5 scale with 5=very important.</i>		Volunteering in general	Local Volunteers
VFI Dimensions		Mean	Mean
Values	I feel it is important to help others	4.41	4.00
	I can do something for a profession/cause that is important to me	4.15	4.06
	I feel compassion toward people in need	4.13	3.58
Understanding	Volunteering allows me to gain a new perspective on things	3.88	3.52
	I can explore my own strengths	3.40	3.39
	I can learn new skills through direct, hands-on experience	3.35	3.38
Social	Volunteering is important to the people I respect	3.30	3.23
Enhancement	Volunteering makes me feel needed	3.20	2.83
	Volunteering brings me satisfaction/recognition I don't get at work	3.13	2.75
Career	I can make new contacts that might help my business or career	2.67	3.11
	Volunteer experience looks good on my resume	2.34	2.65
	Volunteering helps me to explore different career options	2.19	2.50
	Volunteering gives a competitive advantage to my business	2.16	2.58
	Volunteering can help me get my foot in the door at a place where I want to work	1.97	2.35
Protective	Volunteering helps me deal with some of my own problems	2.27	2.16

*Types of Volunteer Activities*

The survey asked respondents "In the last 12 months, have you done any of the following as a volunteer (in person, online or in any other way) on behalf of the association?" Respondents checked all applicable. (Ad Hoc activities shown in italics)

	Volunteers in General		Local Volunteers	
	%	Rank	%	Rank
<i>Provided mentoring, coaching or tutoring for members/students/others</i>	14.4	1	<b>28.9</b>	<b>4</b>
<i>Provided professional advice</i>	13.4	2	<b>23.4</b>	<b>5</b>
<i>Recruited a member or members</i>	12.4	3	<b>41.0</b>	<b>3</b>
Served on a committee for a local chapter or section	11.1	4	<b>83.0</b>	<b>1</b>
<i>Participated in a discussion group, expert panel or report</i>	8.6	5	13.5	8
Spoke or presented a paper	8.5	6	7.6	9
Served on the board for a local chapter or section	7.3	7	<b>55.2</b>	<b>2</b>
<i>Moderated or facilitated discussion groups at meetings or elsewhere</i>	6.3	8	14.3	7
<i>Raised funds</i>	6.2	9	22.8	6
Served on a committee for the parent organization	4.6	12	5.2	10
Reviewed applications as part of credentialing or competitive program	3.2	16	5.1	11
<i>Made a presentation or testified on behalf of the org to legislative body</i>	2.3	18	4.6	12

### *Becoming Volunteers*

The survey asked respondents to indicate how they first learned about the volunteer opportunities available to them through the association?

	%
I don't recall	26.6
Through a local chapter or section	14.2
At a meeting, conference or other event	13.4
I was asked by another volunteer	13.3
A staff member of the organization asked me to volunteer	8.9
I answered a call/ad for volunteers	5.1
Through my employer (current or past)	5.1
Through a professor or someone at my university/school	3.7
Through a posting on their website	3.0
I contacted the organization and offered to volunteer	2.8
I saw an advertisement in the organization's magazine or other publication	2.3
Other way	1.6

## Lessons Learned from Maximum Engagement

In his book *Maximum Engagement: Moving Members, Donors & Customers to Ever-Increasing Levels of Participation*, author C. David Gammel, CAE, defines engagement as . . .

. . . the result of a person investing time and/or money with the organization in exchange for value.

. . . about value – value for the person doing the engaging and the value of that engagement for the association.

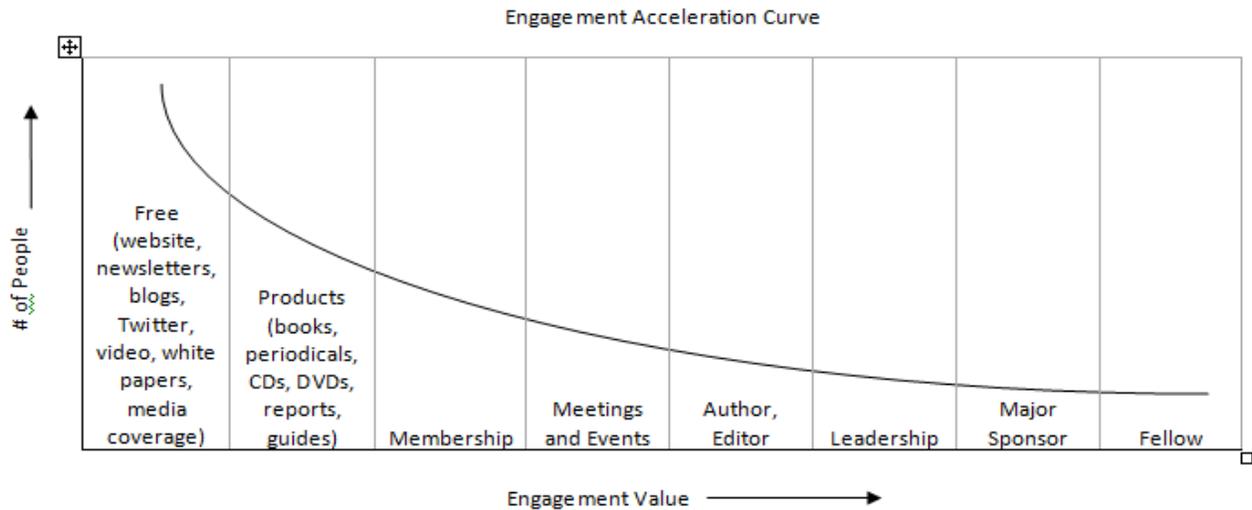
. . . evidence of success and fuel for your mission and future growth

Consistently healthy organizations create more engagement opportunities in areas with strategic value for the organization.

The opportunities to create engagement fall on a continuum of value, from low to high. From a strategy perspective, plot out what lower-value engagement activities and options will feed into higher levels and how you can progress people through them.

Low-Level Engagement	Mid-Level Engagement	Highest Levels of Engagement
Viewing content on website, blog, Twitter feed, Facebook fan page, etc.	Buying a product	Volunteering for a committee/task force
Paying attention to a PSA or press coverage	Attending a conference/event	Serving in a leadership role
Sharing content from your website or other Publication	Applying for a job via your career center	Receiving recognition such as a fellowship or other achievement status
	Writing or speaking	Spending significant money on sponsorship, advertising, exhibit space, etc.

Diversification of engagement is critical – it lets you recover when one of your sources dries up or loses interest in you. If you have only one source of engagement, even if it does a lot for you, your organization is in a precarious position. The failure to perceive enough value is the single greatest reason people fail to renew their membership – diversification of value provides many reasons to remain engaged



As the number of people increases, the value of engagement tends to decrease. Conversely, as the number of people engaging decreases, the value of engagement for them and the organization increases.

Most successful organizations create their curve by design rather than by default. Engagement curves can be designed to accelerate people from low- to high-value engagement activities with your organization.

To create the engagement inventory:

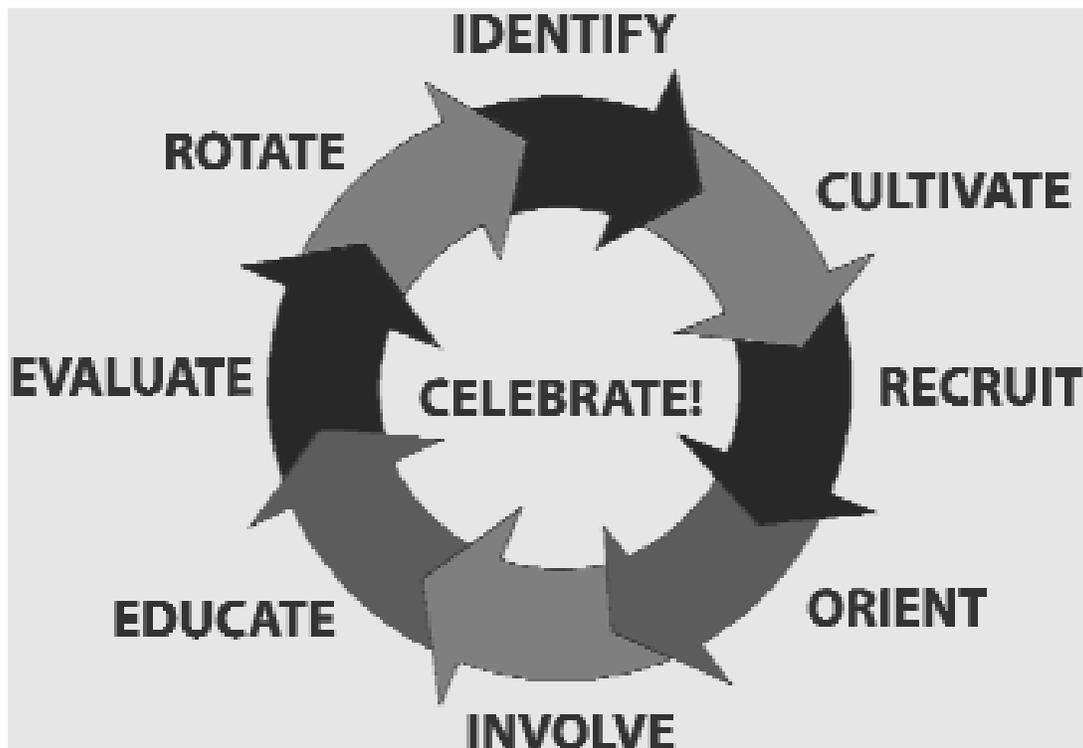
- List all engagement points where someone gives time and/or money to you in exchange for some form of value
- Note the following for each engagement item:
  - Total estimated annual revenue
  - Amount of time it takes for someone to engage in the activity or item
  - Total number of people you estimate engaging with each activity/item in a year
- Goal is to understand the impact of various experiences

Organizations can use this to guide their communications so that people can be targeted for the next offer in your curve.

## The Board Building Cycle (© 2000 BoardSource)

The role of the governance committee is crucial; it tackles one of the principal responsibilities of the board: to ensure that the board continuously works to be as effective as it can be. The governance committee is more proactive than the traditional nominating committee. It should ensure that the organization's work will bring results and that the organization uses time and money effectively, and is accountable and trustworthy. It is the board's mechanism for looking after itself.

The Board Building Cycle builds on the key role of the governance committee and presents an overview and a road map to this process. Organizations with strong, active boards often spend significant time and attention on each part of the board building cycle. Good boards do not just happen. They take care, thought and planning.



Step 1: Identify the needs of the board: the skills, knowledge, perspectives, connections, etc., needed to implement the strategic plan. What do you have? What is missing?

- Before the search begins for new board members, it is important to take stock of the current board. Using a board profile worksheet (such as the example provided as Addendum A), the governance committee can assess what characteristics and skills its current members bring to the table and what gaps need to be filled in order to carry out the strategic plan.
- Each board must decide what characteristics and skills best suit its needs, but some general rules of thumb can guide that process. Consider people with leadership skills, community involvement, political connections, fundraising abilities, shared values and a commitment to the organization's mission.

- Build a diverse board. A homogeneous board that is generally in agreement on issues is not usually the most effective board. To promote open-mindedness and a wide range of ideas, it is usually better to include board members of different skills and professional backgrounds, ages, financial situations, and cultural and ethnic backgrounds, as well as a balance of men and women. A diverse, inclusive board inspires innovation, creative thinking and problem solving.
- To maximize the board's effectiveness, all board members should represent more than one skill or attribute. Another way to expand the resources available to the board is to use advisory councils; groups of people who agree to make themselves available by providing consultation pro bono. It is usually best not to call them advisory "boards"; calling them "councils" better defines their role and avoids confusion with the board of directors.

Step 2: Cultivate sources of potential board members and identify individuals with the desired characteristics. Ask current board members, senior staff, and others to suggest potential candidates. Find ways to connect with those candidates, get them interested in your organization, and keep them informed of your progress.

- Because board membership requires a significant investment of personal time and energy, it is important to find candidates who care deeply about the organization's mission. Cultivation means developing a pool of people for potential board membership.
- Cast a wide net. Every board member should introduce prospective candidates to the organization.
- When prospects have been identified, have them complete a board questionnaire (see example in Addendum B) . The forms should be maintained by the governance committee so that when the time comes to identify new candidates, the committee will have a ready resource.
- As soon as prospective candidates are identified, begin bringing them into the fold. Send them annual reports, brochures, newsletters and other basic information. Involve them on committees, task forces or other volunteer activities.
- To avoid any misunderstanding, it is best to make it clear that not everyone who is cultivated and recruited will be chosen to be a board member, and that the decision is based on many criteria, including getting the right mix of talents and experiences on the board.
- Potential candidates should be identified and cultivated on an ongoing basis, even when there are no slots to fill. Ideally, the board should have a continuous pool of candidates at differing stages of cultivation so that when an opening occurs the process is ready to deliver.

Step 3: Recruit prospects. Describe why prospective members are wanted and needed. Explain expectations and responsibilities of board members, and don't minimize requirements. Invite questions, elicit prospects' interest, and find out if they are prepared to serve.

- The recruitment part of the board building cycle is a highly personal activity - and a two-way street. It is a process of getting acquainted and helping candidates understand what the organization is all about. It also gives current board members a chance to gauge the interest of

prospective board members and determine whether they are right for service on this board at this time.

- Recruitment is a two-step process. First comes the exploration of the person's interest in serving on the board. The second part of the process involves the invitation to join.
- To help candidates get a feel for the organization and its work, introduce them to current board members and key staff. Present them with a board member job description. Invite them to sit in on a board meeting or two. If they haven't already joined a committee or task force, this is a good time to invite them to do so.
- Explore a candidate's willingness to join and his/her reasons for wanting to do so. The motivations that lead individuals to join boards include:
  - Altruism and a concern for the public good
  - Community status and/or public visibility and recognition
  - Altruistic business interests
  - Prestige - affiliation adding to stature, socially, professionally or otherwise
  - Pressure from others and reluctance to say no for fear of negative repercussions
  - To "get in there and get things done"
  - Counter other people's perceptions of one's self
  - Desire to learn
  - Desire for meaning in one's life
  - Desire for power
- There is nothing wrong with any of these motivations, as long as the individual also supports the mission and is prepared to participate actively in the work of the board.
- When making the "ask", consider the following:
  - Phrase your request in terms of the benefits to the listener.
  - Be positive.
  - Show respect and appreciation for your prospect.
  - Give accurate and clear expectations of what the position or role requires.
  - Make sure to listen to the issues or concerns of the listener.
  - Give your prospect an appropriate amount of time to make an informed decision.
  - Strive for win-wins. Use flexibility and creativity to find mutually acceptable outcomes.
  - Accept their answer whether they agree to your request or not.
  - Should your initial request be rejected, consider a counter-offer or secondary offer.
  - Thank them either way for their time and willingness to consider your offer.
- Above all, be honest. Don't paint too rosy a picture to lure candidates onto the board. Not being completely forthcoming about what is involved in board membership can result in a hasty

**Materials to Share with Potential Board Members**

- Annual reports
- Brochures
- Board rosters
- Newsletters
- Publications and programs list
- Web site information
- Schedule of board meetings
- Annual calendar
- Roles and responsibilities of the board
- Roles and responsibilities of individual board members
- Brief written history or fact sheet on the organization
- Committee job descriptions
- Schedules of committee meetings

and embarrassing resignation. Some organizations have board members sign written statements outlining expectations of board members when candidates are asked to stand for election. That helps to avoid unpleasant surprises and to emphasize the seriousness of the commitment (see Addendum C for an example).

Step 4: Orient new board members both to the organization and to the board explaining the history, programs, pressing issues, finances, facilities, bylaws, and organizational chart. Describe committees, board member responsibilities, and lists of board members and key staff members.

- Orientation actually begins before someone is asked to join the board. It starts when that person is first approached about the possibility of serving. The formal orientation is a continuation of that process. It should be held before new board members attend their first board meeting and should be organized by the governance committee, staff and the board chair.
- Each new board member should receive a board manual, or handbook, within 2 weeks of being elected to the board and before the orientation. Although some of this material may have been provided earlier, it is helpful to have it organized and in one place. It should contain:
  - History and mission of the organization
  - Membership statistics
  - Board member job description
  - Articles of incorporation
  - Bylaws
  - Financial information
  - The strategic plan
  - Overview of the organization's programs
  - Roster of board members, staff data and information about committees
  - Minutes from past years' meetings
  - Board policy book
  - Calendar of activities, board meetings and special events
- The board chair plays a big role in the orientation, though it may be organized by staff, the governance committee and/or the board chair. Key board and staff should take part. Some organizations also invite all board members to attend all or part of orientation sessions as a refresher and to meet the new members.
- An orientation session can be tailored to fit varying amounts of time, usually from one hour or two to half a day. Subjects to be covered include the roles and responsibilities of board members, the organization's mission and programs, its strategic plan, finances (financial statements and the most recent audit), fundraising, initiatives, the structure of the board and staff, liability and insurance coverage, and reiterate the time commitment involved.
- Several months into the new board member's term, it is a good idea to schedule a follow-up session to respond to questions, now that he/she has become more familiar with the organization.

Step 5: Involve all board members. Discover their interests and availability. Involve them in committees or task forces. Assign them a board "buddy." Solicit feedback. Hold everyone accountable. Express appreciation for work well done.

- Board members want and need to feel a personal connection to the organization, but it takes inspiration to keep them active and engaged. As board members realize the significant difference they make, they will become more involved. Boards serve themselves best when they keep in mind members' own hopes and aspirations in deciding how to involve them in the board's activities. Try to link them with activities that will help them achieve their own goals as well as those of the organization.
- Getting new board members actively involved early on can build on the momentum of the orientation and tap into their initial enthusiasm. Board members, both new and long-standing, need to be engaged with important work on the board in order to have a stake in it. That work can take any number of forms.
- Building a board is building a team. Make it clear from the start that everyone is expected to participate and follow through on their assignments and that they will be held accountable. Encourage people to get involved in areas where they can use their expertise but also allow opportunities for learning, personal growth and leadership development. Be sure that the work is well dispersed among board members. If too much power and decision making lie with the board chair or a few select board members, other members may lose interest. Serving on the board should be an enjoyable experience.
- To keep board members engaged, board meetings need to involve their participation. Meetings should be structured in such a way that board members feel that their time is well spent, which means focusing on strategic issues rather than on administrative/operational issues and listening to reports. Set time aside for questions and discussions and make sure that a few people do not dominate in board interactions.

Step 6: Educate the board. Provide information concerning your mission area. Promote exploration of issues facing the organization. Hold retreats and encourage board development activities by sending board members to seminars and workshops. Don't hide difficulties.

- Educational activities, such as board presentations and retreats, as well as outside workshops and seminars, can keep the board well informed and help in its planning and decision making. Subjects might include fundraising, strategic planning, liability issues or how to read a financial statement, as well as mission-related topics.
- Some form of education should be on the agenda of nearly every board meeting. It might be a presentation by an outside consultant or staff expert. Board members might be assigned as individuals or as groups to explore certain subjects and then report their findings to the full board.
- The grid below, developed by the American Chemical Society, addresses the different levels of volunteer (emerging to advanced) and defines learning objectives and outcomes for each level.

	<b>Personal Capability</b>	<b>Interpersonal Skills</b>	<b>Focusing on Results</b>	<b>Setting a Clear Direction</b>
<i>Emerging Volunteers</i>	Introduction to governance structure	Communication skills	Accepting responsibility	Articulating personal goals
<i>Emerging Leaders</i>	Managing projects	Running meetings	Involving volunteers	Understanding our members
<i>Developing Leaders</i>	Innovation (styles and processes)	Coaching and feedback Negotiation skills	Working across boundaries	Leading change
<i>Advanced Leaders</i>	Influencing without authority	Communicating outside the organization	Succession planning	Strategic planning

Step 7: Evaluate the board as a whole, as well as individual board members. Examine how the board and chief executive work as a team. Engage the board in assessing its own performance. Identify ways in which to improve. Encourage individual self-assessment.

- To be sure they are on the right track, boards must occasionally take time out to gauge how they are doing. Whether a formal self-assessment (Addendum D) or informal self-reflection, the board can approach it in a variety of ways.
- The simplest form of evaluation takes place at the end of regular board meetings (Addendum E). Generally, feedback relates to whether the meetings are run efficiently and use the board members' time wisely.
- In addition to considering the performance of the board as a whole, the governance committee should work with individual board members to take stock of how they are fulfilling their obligations and whether they are pulling their weight.

Step 8: Rotate board members. Establish term limits. Do not automatically re-elect for an additional term; consider the board's needs and the board member's performance. Explore advisability of resigning with members who are not active. Develop new leadership.

- In the early stages, board membership can be exhilarating and challenging. Over time, if the board remains largely unchanged, it can grow stagnant. To keep board members from burning out during their tenure on the board, allow ample opportunity for change.
- Offer them the chance to serve on different committees, or temporarily suspend their participation on a standing committee to serve on an ad hoc committee or task force. Giving board members the chance to chair committees or assume other leadership positions not only helps to hone their skills and keep them active, but contributes to leadership development and facilitates succession planning.
- Over the longer term, boards can keep things moving by making use of term limits. Staggering terms ensures that new members will join regularly and that no more than one third of the

existing members will retire from the board in any given year.

- Asking someone to leave is often difficult, so the temptation is sometimes to expand the board instead. But expanding a board that is already at its optimum size is risky. It sets bad precedent and the board could eventually grow out of control.
- As board members leave it is a good idea to conduct an exit interview and invite them to remain connected to the organization.

Step 9: Celebrate! Recognize victories and progress, no matter how small. Appreciate individual contributions to the board, the organization, and the community. Make room for humor and a good laugh.

- The board should celebrate individual, board and organization achievements
- However it is handled, the leadership should find a delicate balance in recognition - enough so that everyone has the opportunity to be justly appreciated for outstanding accomplishments but not so much as to cause the recognition to lose value.
- While formal ceremonies are welcome, it is often the unexpected remembrances by staff, members or other board members that leave lasting impressions.
- This step should not be overlooked in the rush of getting business done. Keep it fun and light. Creating a climate of appreciation and laughter helps create energy to deal with the challenges that crop up.

## Nominations and Elections

### *Improve Your Nominations*

Engaging a sufficient number of volunteers with the necessary knowledge, skills, and expertise has been a growing challenge for associations for some time. Serving on the board of directors of an association still has cachet as a resume builder and great appeal for those who want to give back to their industry, profession, or cause. However, serving on the board of directors is also perceived as an enormous commitment of time and energy (and in some cases money). Moreover, downsizing has increased members' individual workloads, making it more difficult to get, or take, time off to participate in association committees or on the board.

Members still want to be engaged in the work of the association, but they are looking for shorter time commitments and opportunities for participation in ad-hoc groups or one-off projects. The new nominating (aka governance) committee has evolved into a leadership-development committee, charged with cultivating and recognizing leadership within the organization in order to have an ongoing pool of diverse and qualified candidates for the board of directors, standing and ad-hoc committees, and one-off initiatives.

What does this new nominating committee look like? It takes a strategic approach in four areas of leadership development:

1. **Marketing Volunteer Opportunities.** The nominating committee can play an instrumental role in ensuring that the opportunity to nominate or serve as board candidates is widely promoted. This can be done via email blasts, announcements in publications, at face-to-face gatherings, and personal asks; which have all proven to be effective.
2. **The Nomination Process.** The call for volunteers should include a list of all the opportunities available and a concise description of the purpose and time commitment involved in serving. Include questions about preferred methods of involvement: teleconferences, face-to-face meetings, email, or all of the above. Often there is no lack of candidates for board positions. The issue is usually a lack of qualified candidates—members who have the necessary qualifications to do the job.
3. **Leadership Development and Education.** The focus in this area is to constantly encourage, facilitate, and coordinate the implementation of various leadership-development training sessions and opportunities in order to prepare and grow future volunteer leaders. The evolved nominating committee gives valuable input about the leadership-development needs of the members.
4. **Constant Evaluation of Leadership-Development Activities.** Even the best strategic approach needs evaluation to measure effectiveness and identify areas of process improvement. An evolved nominating committee constantly monitors changes in the strategic direction set by the board, seeks board feedback on future required leadership skills and training needs, and evaluates the efficacy of current training. This helps keep the leadership-development process fresh, relevant, and sustainable.

### *Transforming the Nominations Process*

Want to start transforming your nominations process fast? Here are a few tactics you can implement quickly.

- Write a letter to the employers of participating members expressing appreciation for their service to the association. It's an opportunity to get the association's name and purpose out there, and it may help your member receive recognition or financial support for their participation. Ask members for the proper name and title of the person to receive the letter and secure permission first.
- Expand the reach of your call for volunteers. Post the information on your website and allow volunteers to register their interest in volunteering throughout the year.
- Streamline your bylaws, removing all but absolutely essential committees (usually finance/audit, bylaws, and nominating/leadership-development committees). This provides flexibility for creating workgroups as needed. Describe the process for creating them in standing rules or board policy, which can be changed more readily than bylaws.
- Keep committee and task-force job descriptions and charges up to date. Include expected outcomes, the timeframe in which to get the work accomplished, staff and financial resources available to get the job done, and to whom the work group is accountable.
- Clarify lines of accountability. Not everyone needs to be appointed by, or accountable to, the board chair just because they are members. If volunteers are doing staff work, then the CEO should be able to seek out and appoint appropriate volunteers.
- Automatically sunset all ad-hoc groups, task forces, or special committees to prevent a proliferation of volunteer work groups whose main function ends up being finding work to do.
- Implement a simple evaluation system to document individual participation in order to identify star performers as well as eliminate those who want titles every year but somehow find it impossible to participate in any assignments.

#### *Impediments Hindering Leadership Continuity*

Governance Committees should be aware of the four impediments that hinder many boards as they seek leadership continuity:

##### 1. Board Job Description Missing in Action During Nominating Process

Organizations shouldn't wait until the orientation process to explain the role of the board and the responsibilities of its members; it should be shared during the nomination process, if not sooner.

An explicit job description that addresses both collective and individual responsibilities provides an essential governance tool to both new and seasoned board members. The board's job description defines the baseline criteria for later reviewing the performance of incumbents when they are eligible for re-election or appointment for another term.

##### 2. Relying on the Traditional Leadership Path

The traditional pathway to board service has emphasized longevity and seniority to tap prospective board members. Although previous leadership experience can be quite valuable, this path

overlooks other important qualities of board candidates. Emerging leaders and otherwise qualified individuals who have not climbed the leadership ladder remain below the radar screen. Unfortunately, long-term service to the organization does not automatically produce the best board candidates.

Recognizing that they should be more proactive in cultivating future leaders to serve on the board (as well as committees, task forces, and advisory groups from the membership), a growing number of organizations have instituted promising leadership development strategies to offer their members more opportunities to become leaders

### 3. Unarticulated Leadership Qualifications for Board Service

Most associations have strategic goals and priorities, and most also have some informal or formal criteria for board eligibility. What is missing is the link between the two. The most common characteristics sought in new board members tend to reflect minimal requirements such as membership in good standing, service on association work groups, willingness to devote the required time, and sometimes professional certification in the field.

Some governance committees have added new qualifications to explore in the vetting process for board candidates. These new competencies include knowledge or experience with governance, the ability to think strategically, and the commitment to work effectively within a collective decision-making body.

If the board's composition does not include diversity in gender, age, race, ethnicity, geographical locale, or professional practice, it is less likely to reflect (in perception or reality) the interests and needs of the stakeholders.

A more holistic approach is for the board, on an annual basis, to help the nominating committee project the board's optimal composition in terms of three practical, interrelated dimensions:

- Eligibility requirements
- Desired competencies
- Diversity criteria

The best boards are a mix of characteristics, skills, experiences, and diversity. This ideal board profile is not dictated by a formula. It should be driven by the particular and current needs of the organization.

A good nominating process will look not only at the major issues facing the organization in the next two or three years and the job description for the board; it will also take into account how many of the current board members fill the requirements identified in the ideal board profile and what will be lost from departing board members who complete their terms.

### 4. Underutilizing the Nominating Committee

If the nominating committee is composed of members who do not understand the strategic priorities of the organization or the role of the board, the committee is unlikely to understand what is most needed from new board members. Boards that have been effective in playing a more strategic than operational role do not rely on a rigid, climb-the-ladder approach to board service.

The best candidates are likely to emerge from a rigorous process of candidate identification, nomination, screening, and selection. It is the nominating committee's job to manage the leadership succession process on behalf of the board, not to anoint new board members.

Successful nominating committees invest time in at least four areas:

1. Understanding the needs of the organization and the board going forward.
2. Communicating to the members the process for identifying and electing the most qualified candidates in a transparent, timely, and comprehensive manner.
3. Carefully evaluating and screening the prospective candidates to prepare the slate with the most qualified candidates.
4. Ensuring that the pipeline for potential candidates is as wide and accessible as possible.

Every nominating committee member can benefit from orientation and continuing education to understand the latest strategic plan, the key challenges faced by the next board, and the competencies needed from board members.

More nominating committees now require additional information from candidates in both written form and face-to-face interviews. Nominees are frequently asked to submit a "personal data form" that includes information such as:

- Letter of intent and level of interest in serving on the board
- Self-appraisal form
- Curriculum vitae
- Conflict-of-interest disclosure statement
- Description of how the nominee will provide the necessary time for board service in light of his or her current work demands
- Names of references

The best nominating committees gather intelligence from a variety of sources in assessing a candidate's capacity to work effectively within the group process of a collective decision-making body.

## **Motivating and Managing Volunteers**

In her book *The Lazy Leader's Guide to Outrageous Results*, Cynthia D'Amour offers suggestions to chapter leaders on how to get the most out of your volunteers.

D'Amour contends that if you want to move the mission of the organization forward, you must embrace a team effort, rather than doing all the work yourself. As a leader, you should be focused on developing people rather than doing the work.

Celebrate the work of others rather than moan about all the work you've had to do yourself. Your success will be about the work of others; not about you. For example, encourage your volunteers to make the announcements at chapter meetings so they can get exposure and practice their speaking skills. At board meetings, brag about the efforts of your team and give kudos to specific volunteers who are making things happen.

*Focus on building relationships - when someone asks you to do work, make a great referral*

People will ask you to take on work because they can trust you will get it done; not because you are the perfect fit for the work. When you give a referral you'll open the door for someone else to get involved, will grow your reputation, and will stay focused on moving the mission forward; rather than doing the work yourself.

Be interested in meeting new people and learning what they want from volunteering. In order to be a master referrer you need to know people to refer to others. Also, be aware of the special gifts, talents and interests of others.

Encourage those who you give a referral to make sure they mention you provided their name. It lets people know you are looking out for them. Follow-up with the referral to see how things are going; it continues to build your relationship with them.

*Make decisions based on people volunteering - rather than what you can do at the time*

You shouldn't be limited by how full your personal plate is. As you build your team of volunteers, you'll be able to expand the reach of your project or area of responsibility, and create an even bigger impact.

*Let go of determining ALL the tiny details*

When you personally do all the work, the tiny-detail decisions matter. When you work with a team, others will want to put their fingerprints on the results. This includes making some decisions about the little things.

Instead, together define the end picture - what success looks like. You don't need to have all the answers; instead invite your volunteers to get involved in describing what success looks like. Collectively, identify the project "must-haves" and agree on parameters. The rest can be open to the interpretation of team members, which increases their sense of ownership and commitment to the team.

*Infuse energy into the experience of volunteering*

Potential volunteers have tons of options for where they can spend their time. Part of their decision will be based on what it feels like to work with you. Your goal is to create an experience where people

have fun and feel they got a lot of work done too. Here are six tips to boost volunteer attendance at meetings:

1. Be inviting - make an effort to get people involved. Your welcoming attitude sets the stage for attendance and excitement for what you are doing
2. Project excitement; not desperation - if you act desperate for people to help out you become volunteer repellent
3. Convey the great work your team is doing and invite others to participate - too often struggling leaders talk about how hard they are working, all the time it's taking and chase volunteers away with the impression it's 110% volunteer effort or nothing. Be willing to take help where you can get it and welcome even those who only have a few hours to help.
4. Give great notice - make sure you get meeting dates and agendas out in advance. Include meeting time and place on the agenda so new people know where to go. A cell number is a nice touch in case volunteers get lost or are running late.
5. Identify hot topics in advance - strategic conversations are part of what will make your meetings more fun. Spending the bulk of face-to-face time listening to updates is an old school approach to meetings. The opportunity to analyze, brainstorm and problem solve is what makes meetings more interesting for today's volunteers.
6. Create solutions at your meetings - don't arrive with all the answers already decided.

#### *Maximize your personal leadership velocity*

You want to move your mission forward as far as possible with as little personal effort as possible. Your focus is on finding the most efficient and effective use of your time. There are a variety of ways to increase your velocity. Simply being more aware of what you are doing can have an impact. So can how you work with your team and individual volunteers. Ask yourself: Am I micro-managing? Do I really need to have the final say in this? Is this still relevant? Can someone else do this? Does this work energize me?

To maximize your leadership velocity through your work with teams:

1. Start with the end in mind - together, create a picture of what success looks like when the team's work is done. You do not need to have all the answers. The more team members can buy-in to the possibility you are creating the more they are going to take ownership and stick around to do the work
2. Communicate progress regularly with all - regularly share where the project stands, what needs to happen, who has completed the work and found success. Build in mini-milestones so every meeting involves celebrating progress.
3. Resist encouraging martyrdom in your team members - there will always be a few folks who are willing to say "yes" to anything you ask and will work their fingers to the bone. Resist the temptation to dump everything on them. More involvement means more people committed to moving the chapter's mission forward.
4. Coach your team members to tap into resources beyond the actual team - a lot of time can be wasted when members try to do everything internally. Involving other chapter members can provide the resources needed to get to the next level.
5. Focus on team achievement - during your meetings, appreciate the contributions individuals made. In meeting wrap-up, focus on team achievement - how far you have

come and where you are going next. With a team focus, rather than a superstar focus, everyone's contributions matter.

You can also impact your velocity as you work with individual members:

1. Focus on building relationships - the better you know your members, the less it is about work and more about them having a positive, relative experience. When your volunteers feel like you care about them, they are more likely to complete their work.
2. Mind your manners with your volunteers - treat them with respect. Appreciate their efforts to help you. Write thank you notes
3. Help your team members achieve their personal goals - everyone has a personal reason or goal in mind when they say yes to volunteer. You want to know what each member's goals are and help all of them get their needs met by volunteering.
4. Become a master coach - learn to pull information from your volunteers instead of always giving them the answers. Teach them to problem solve. Show them you trust them to come up with a correct solution.

Become a master of tapping into other resources

Your members are only one slice of the resources you can tap into. There are many others who can also help you get more done:

1. Other organizations similar to yours - there may be local chapters of similar organizations who complement your mission. They can be a great source for cross-promoting events; sharing costs of speakers; swapping trainers or board retreat facilitators; collaborating on mega-events and creating great networking events.
2. Your local chamber of commerce - you might use them to acquire speakers for chapter meetings; tap specialists to give you feedback and find needed talent and leadership to join your team.
3. Your local colleges - also offer diverse possibilities for you to tap in to including affordable meeting space, expertise in various areas and students who might be willing to help your team as part of a project for a class.
4. Online relationships

Embracing D'Amour's concepts will bring the following benefits:

- You won't have to do all the work
- You'll have more time to be strategic
- You won't have to have all the answers all the time
- You'll be giving the gift of involvement
- Your leadership legacy grows

## Generational Impact on Volunteering

In her book *The End of Membership As We Know It: Building the Fortune-Flipping, Must-Have Association of the Next Century*, Sarah L. Sladek contends that the shift in human capital poses the greatest threat to associations because most associations remain entirely governed and supported by Baby Boomers. Most associations haven't developed strategies to prepare for the massive exodus of volunteer and members upon their retirement. According to BoardSource, only 2% of board members are under 30 years old.

Younger generations will volunteer, but they have different motivations for doing so. The primary values and objectives of Generations X and Y are:

### *The opportunity to lead*

- Don't want to jeopardize their personal happiness to do so.
- Leadership should be:
  - an enjoyable, rewarding experience
  - with real outcomes
  - and recognition for their efforts
- Turn-offs:
  - multiple day board meetings
  - sitting in endless meetings
  - engaging in lengthy discussions
  - renewing a board term year after year.
- Possible benefits:
  - Leadership training for young professional interested in board service and/or the pursuit of leadership roles within their careers
  - Short-term leadership opportunities, such as organizing a service project or leading a task force
  - The opportunity to serve on the board (but be open to redefining what board service actually means)
  - Recognition for emerging leaders and outstanding young members or volunteers

### *The opportunity to learn*

- Generation X and Y are the first generations to have never known job security.
- They live in constant fear of losing their jobs.
- As a result, they actively seek the opportunity to learn new skills in case they do lose their jobs.
- Today's young professionals are well-educated, fast learners and capable of multi-tasking. They are easily bored and readily seek new challenges

### *The opportunity to make a difference*

- For Generations X and Y, salary and prestige take a back seat to work-life balance and working for an ethical organization.
- The way they want to work and whom they choose to work for carry over into their decision making process with memberships and volunteering
- They want to know their participation in your association can literally make a difference. The idea of a transactional membership doesn't hold much appeal.
- Younger generations (46 and younger) will invest in membership if, and only if, the membership benefits them personally and professionally and also benefits their community or industry

If younger generations aren't joining, it isn't because they haven't grown into it yet; it's because your association isn't delivering value to them. Gen X has a high willingness to join but they expect more info and involvement opportunities.

Belonging to an association equals trusting in it. Gen X & Y are less trusting and less accepting of lapses of trust. To build trust: listen to their point of view; create solutions; encourage feedback and be inclusive.

	<b>Baby Boomers</b>	<b>Generation X</b>	<b>Generation Y</b>
Born	1946-1964	1965-1981	1982-1995
Size	78 million	48 million	80 million
Characteristics	Hard-working, loyal, confident, competitive	Anti-authority, self-reliant, family focused	Digital thinkers, feel entitled, needy
Why They Are the Way They Are	Grew up in a time of affluence. Reared to pursue the American dream	Children of workaholics & divorce, cable TV. Reared to be self-sufficient	Micro-managed by parents, technology, always rewarded for participation. Reared to be high achievers
Communication Styles	Prefer detailed dialogue in-person or via phone. Appreciate meetings. Believe no news is good news.	Prefer clear, concise communications – not over explaining, clichés or corporate jargon. Prefer e-mail.	Prefer frequent feedback and problem solving via technology instead of phone calls or meetings.
Problems They Are Facing Right Now	Dwindling retirement funds, job dislocation, rising health care costs or inadequate health care coverage	Debt, caring for young children and aging parents, balancing life and career, stuck in middle management	Debt, unemployment, difficulty transitioning from college to career, negative stereotypes, being taken seriously.
Why They Join	Opportunities to lead & leave a legacy	Opportunities to further their careers	Opportunities to learn from others
Volunteer Styles	Want to lead. Like to manage others. Like to hold meetings and discuss strategies	Want autonomy. Hate being micromanaged or anything that wastes their time.	Want structure. Expect immediate feedback and increasing responsibility.
Flaws	Have a “been there done that” attitude, not always open to new ideas	Have difficulty committing, tend to have a “wait and see” approach	Have short attention spans and high demands and ask “what’s in it for me?”
Turn-offs	People suggesting they try something new	Chaos, distrust, loyalty that goes unrewarded	Dismissing their ideas because of their lack of experience

## **Recognizing and Rewarding Volunteers**

Volunteers should be recognized for their contributions to the organization. This serves not only to satisfy basic human needs but also to motivate volunteers to continue their involvement. Recognition lets volunteers know that others acknowledge and appreciate what they do. It tells them they are doing something well and that they have something meaningful to contribute. Recognition and approval give volunteers a feeling of warmth, pleasure and accomplishment.

Recognition should be considered a process rather than a product. When effective volunteer recognition is integrated into the total volunteer management process, volunteers feel rewarded, valued and positive about volunteering as a whole. Meaningful recognition leads to increased satisfaction, which leads to increased volunteer retention.

Each volunteer is unique. This realization helps leaders become more sensitive to the uniqueness of each individual so they can provide the most meaningful opportunity possible to help each volunteer maximize his or her potential. It also allows managers to develop appropriate, effective and sensitive recognition responses based on individual preferences.

A volunteer recognition program should consider two basic types of recognition: extrinsic and intrinsic. Extrinsic recognition includes tangible, outward forms of recognition such as pins, certificates, trophies, etc. Intrinsic recognition involves less tangible, inward forms of recognition including the pride of accomplishment, self satisfaction and the volunteer's personal belief that s/he accomplished, contributed and did better today than last week. With the diverse types of volunteers, there must be a balance of intrinsic and extrinsic forms of recognition in volunteer programs.

Recognition is closely associated with motivation. If people are rewarded with things that are significant or relevant to them then the recognition process is most effective. Leaders should make every effort to use personalized recognition to build an ongoing relationship with each volunteer. There can be no "one size fits all" approach to volunteer recognition. The kinds of recognition may be as varied and wide ranging as the individuals. Recognition that is well received and appreciated by volunteers in one situation may not be the most appropriate or effective for volunteers in another situation. Both formal and informal methods of recognizing volunteers can be effective and leaders should experiment to determine which combinations are most effective in a specific situation.

Recognition is an ongoing, integrated component of any effective volunteer program. A once-a-year event to recognize all volunteers should not be seen as a substitute for the day-to-day recognition of contributions. All paid staff should be engaged in the on-going recognition of volunteers.

### *Informal volunteer recognition*

Informal methods of recognizing volunteers and their contributions are frequently overlooked in place of more formal methods, yet are often the most effective. A simple yet personally delivered "Thank you for your help" is always well received and conveys personal attention and appreciation. Thank you letters on organizational letterhead are always appreciated. Ongoing opportunities for a volunteer's development both as an individual and a volunteer, recognize them as a valued member of the organization.

Informal recognition should be an on-going part of any volunteer program. All paid staff plays an important role in informal recognition. The ways they greet and interact with volunteers on a day-to-day

basis are important elements of informal recognition. Paid staff should make every effort to know volunteers' names, acknowledge their presence, and appreciate their contributions. Leaders may develop ongoing recognition by sending cards for birthdays or special events, or sharing volunteer information through newsletters. Research shows that a hand written note to a volunteer from a client, manager, volunteer manager or organizational leader is one of the best-accepted forms of recognition.

#### *Effective forms of formal volunteer recognition*

Formal recognition of volunteers involves more traditional and structured methods. Certificates of appreciation and special pins or other tokens may be presented to volunteers as enduring mementos of the organization's appreciation. Presentations of such items occur at public gatherings that involve a pre-planned program, such as a meeting of all volunteers or special reception or meal. Formal recognition for volunteer contributions may also involve widespread public recognition using newspaper, radio or television media.

One of the most widespread forms of formal volunteer recognition is the volunteer recognition party or luncheon. A well-planned recognition meal can be an inspirational and motivational experience.

#### *Important consideration affecting volunteer recognition*

Whatever combination of informal or formal means is used to recognize volunteers and their contribution, three important considerations should be noted.

First, the individual who is recognizing the volunteer should know and be familiar with the volunteers and their contributions. Such familiarity increases the volunteer's personal satisfaction and self esteem regarding her recognition and contributions to the organization.

Second, the emphasis at any formal recognition with a planned program should be on the volunteers and their contributions, not on other special guests, visitors or organizational administrators.

And, third, an opportunity should be provided for the volunteer being recognized to offer a testimonial regarding her volunteer experience. Such testimonials not only serve to strengthen the individual's motivation to continue as a volunteer, but also function to recruit and motivate other individuals to volunteer.

# BOARD PROFILE

This worksheet helps identify gaps and desired characteristics of your board. Ask your board members to complete this form anonymously and then have a staff person or volunteer compile a survey summary that the board can review together. The board should focus on the skills and experiences as a whole, rather than individually. The summary may then be used as a discussion piece to recognize areas in which there are gaps on the board that you wish to fill. (You may delete or add categories on the worksheet as appropriate for your nonprofit board.)

BOARD MEMBER	1	2	3	4	5	6	7	8
<b>Gender</b>								
Female	X	X		X		X	X	X
Male			X		X			
<b>Age</b>								
<19								X
19-24			X					
25-34				X				
35-50	X					X	X	
51-60		X			X			
>60								
<b>Race</b>								
Asian/Pacific Islander								
Hispanic/Latino								
Caucasian	X		X	X	X	X	X	
African American		X						X
Native American								
Other								
<b>Residence</b>								
X County								
Y County		X						
C County								X
Urban					X		X	
Rural	X		X					
<b>Yrs. on Board</b>								
less than a year			X		X			X
1-2- years		X						
3-4 years						X		
5 or more years	X			X			X	

BOARD MEMBER	1	2	3	4	5	6	7	8
<b>Serve on other boards</b>								
No			X	X	X	X	X	X
Yes	X	X(2)						
<b>Personal attributes*</b>								
Easily compromise	4	4	3	4	3	4	4	4
<b>Prior leadership service on other boards</b>								
President								
V-P								
Treasurer								
Secretary								
Committee Chair		X						
<b>Wants to be a leader</b>								
No			X	X			X	X
Maybe						X		
Yes	X	X			X			
<b>Relationship to XXXX</b>								
Client			X					X
Family of Client				X		X		
No prior relationship	X	X			X		X	
<b>Expertise</b>								
Financial mgmt								
Admin/mgmt					X	X		
Marketing/PR	X					X	X	
Grant writing	X			X				
Legal								
Educational Program design	X	X		X	X	X	X	X
Language skills							X	X
Computer/IT							X	
Organizational skills		X		X		X		X
Fundraising (other than grant writing)		X						X
Personnel				X	X			
Planning		X		X		X		X
Research & evaluation				X	X		X	
Org. Development		X			X	X		

\* Scaled from 1=not at all to 5=fits me perfectly

BOARD MEMBER	1	2	3	4	5	6	7	8
Understand NP fundraising	4	3	3	4	1	4	1	3
Good mediator	3	4	3	4	4	4	5	3
Enjoy talking about XXXX to others	4	4	5	3.5	4	4	5	5
Like group process and group decision making	4	5	4	3	4	4	4	5
Committed to XXXX mission	5	5	5	4	5	4	5	5
Enjoy fundraising	3	3	4	2	3	4	3	2
Tactical thinker	2	4	2	3	4/5	4	3	3
Strategic thinker	2	4	4	3	4	4	5	5
Consensus builder	3	4	3	3	4	4	3	2
Predominantly a leader	3	4	4	3	4	4	5	5
Predominantly a follower	4	2	2	4	4	4	3	3
Comfortable with flux & change	4	5	2	4	4	4	3	3
Good sense of humor	5	4	4	4	4	4	5	4
Comfortable with diversity	5	5	4	5	4	4	5	4
Accountable	4	5	4	5	3/4	4	5	5
Enjoy learning new things	5	5	5	5	5	4	4	5
<b>Connections**</b>								
School district	M	F	A					A
Wealth	A	A	A				F,A	F
Recognized community leaders	F	F					F,A	
Corporations (but not banks)		F				M	F,A	F
Banks		F	A				F	
Women's groups		M				F	F	F
Service clubs		F	F					F
Men's organizations		F						F
Religious leaders	A	M	A					
Mentoring programs	A					M	M,F	M
Clinicians				M			M,F,A	
Social workers	A					F	F,A	

\*\* M=me; F=family member/close friend; A=acquaintance

## BOARD QUESTIONNAIRE: XXXX

Please provide the following information about yourself, being as honest as possible. Your answers will help us gain a better understanding of just who and “what” is currently on the board of XXXX, and to identify the gaps between what we have and what we still want for the board.

Thank you.

**Instructions:** Please put a mark in the space to the left of your answer.

1. What is your sex?  
 Male  Female
2. What is your age in years?  
 Under 19  19-24  25-34  35 to 50  51 to 60  Over 60
3. How do you identify your race?  
 Asian/Pacific Islander  Black/African American  Hispanic/Latino  
 Native American  Caucasian  
 Other (please specify) \_\_\_\_\_
4. Where do you live?  
 In XXX County: Please specify the section of the County \_\_\_\_\_  
 Outside of XXX County: Please specify where \_\_\_\_\_
5. How long have you been on XXXX's board?  
 Less than one year  1-2 years  3-4 years  Five or more years
6. Do you now or have you ever served on the board of any other nonprofit organization?  
 No  Yes, I've served/am serving on \_\_\_\_\_ other boards
7. If you have ever served on another board, did you ever serve as a leader (president, vice-president, secretary, treasurer or chair of any committee) on another board?  
 I've never served on another board  
 No, though I've served on another board(s), I was never a leader  
 Yes, I served as \_\_\_\_\_ on another board(s)  
(please specify all positions you've held)
8. Do you have any interest in being a leader on XXXX's board?  
 No  Yes; I would be interested in being a leader of XXXX; please specify the position: \_\_\_\_\_
9. Are you or have you ever been a:  
 A participant in a XXXX program  A facilitator of a XXXX program  
 Related to a participant in a XXXX program

10. What special skills/areas of expertise do you have? Please mark all that pertain to you.

- |                                                                            |                                                   |                                                     |
|----------------------------------------------------------------------------|---------------------------------------------------|-----------------------------------------------------|
| <input type="checkbox"/> Financial management                              | <input type="checkbox"/> Organizational skills    | <input type="checkbox"/> Administrative/ management |
| <input type="checkbox"/> Fundraising, besides grant writing                | <input type="checkbox"/> Grant writing            | <input type="checkbox"/> Marketing/public relations |
| <input type="checkbox"/> Personnel                                         | <input type="checkbox"/> Research and evaluation  | <input type="checkbox"/> Planning                   |
| <input type="checkbox"/> Legal                                             | <input type="checkbox"/> Education program design |                                                     |
| <input type="checkbox"/> Organizational development                        |                                                   |                                                     |
| <input type="checkbox"/> Language skills (please specify) _____            |                                                   |                                                     |
| <input type="checkbox"/> Computer/technology skills (please specify) _____ |                                                   |                                                     |

11. On a scale of 1-5, where one means that this descriptor does not apply at all to you and 5 indicates that the descriptor describes you perfectly, indicate (by however it is easiest for you to do electronically) how each of the following descriptors applies to you.

	Not at all					Perfectly
	1	2	3	4	5	
Can easily compromise	<input type="checkbox"/>					
Understand nonprofit fundraising	<input type="checkbox"/>					
Good mediator of group discussion	<input type="checkbox"/>					
Enjoy talking about XXXX to those outside of XXXX	<input type="checkbox"/>					
Enjoy group think/decision-making	<input type="checkbox"/>					
Committed to the mission of XXXX	<input type="checkbox"/>					
Enjoy fundraising	<input type="checkbox"/>					
Tactical thinker/implementer	<input type="checkbox"/>					
Strategic thinker/visionary	<input type="checkbox"/>					
Consensus builder	<input type="checkbox"/>					
Predominantly a leader, but can also follow	<input type="checkbox"/>					
Predominantly a follower, but can lead	<input type="checkbox"/>					
Am comfortable, for a while, with flux and change	<input type="checkbox"/>					
Have a good sense of humor	<input type="checkbox"/>					
Comfortable with diversity	<input type="checkbox"/>					
Accountable	<input type="checkbox"/>					
Enjoy learning new things	<input type="checkbox"/>					

12. Please indicate if, and if so how, you have links to any of the following categories. If you do not, simply skip that category.

	Me	Family Member	Close Friend
School district	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Wealth	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Recognized community leader	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Corporations other than banks	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Banks	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Other women's groups	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
American Association of University Women	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Service clubs (i.e., rotary, lions, etc.)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Forum of Executive Women	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Men's organizations	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Religious leader	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Mentoring programs	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Clinicians	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Social workers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Thank you for this information.

Please return, electronically, to  
Thank you

. Return by DATE.

## Board Member Agreement

As a board member of the SIM \_\_\_\_\_ Chapter, I am fully committed and dedicated to the mission and have pledged to carry out this mission. I understand that my duties and responsibilities include the following:

1. I am fiscally responsible, with other board members, for this organization. I will know what our budget is and take an active part in reviewing, approving, and monitoring the budget and fundraising to meet it.
2. I am legally responsible, along with other board members, for this organization.
3. I am responsible to know and oversee the implementation of policies and programs.
4. I accept the bylaws and operating principles manual and understand that I am morally responsible for the health and well-being of this organization.
1. I will give what is for me a substantial financial donation. I may give this as a one time donation each year, or I may pledge to give a certain amount several times during the year.
2. I will actively engage in fundraising for this organization in whatever ways are best suited for me. These may include individual solicitation, undertaking special events, writing mail appeals, and the like. I am making a good-faith agreement to do my best and to raise as much money as I can.
3. I will actively promote SIM \_\_\_\_\_, encourage and support its staff, and work in concert with the board.
4. I will attend board meetings, be available for phone consultation, and serve on at least one committee. If I am not able to meet my obligations as a board member, I will offer my resignation.
5. In signing this document, I understand that no quotas are being set, and that no rigid standards of measurement and achievement are being formed. Every board member is making a statement of faith about every other board member. We trust each other to carry out the above agreements to the best of our ability.

Signed \_\_\_\_\_ Date \_\_\_\_\_

# BOARD SELF-ASSESSMENT

BOARD SELF-ASSESSMENT

Please answer the following questions about your Board and yourself as candidly as possible:

**1. How long have you been on the Board?**

- Less than six months                       Between six months and a year  
 More than five years but less than ten                       Ten or more years  
 Other (please specify):

**2. Have you seen written copies of:**

	No	Yes	Yes, I've seen and reviewed within the last year	I can't recall	N/A
The organization's official mission statement	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
The organization's by-laws	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
A Board Member job description	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
A job description for the whole Board	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
The Executive Director's (or highest-level paid staff person's) job description	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Personnel policies	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
The annual budget	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
The most recent audit	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
The current strategic plan	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

3. How effectively is the mission used as a compass for guiding the Board in its discussions and decision-making?

- 1. Not at all effectively
- 2.
- 3.
- 4.
- 5. Very effectively
- Unsure

4. As an ambassador of your organization, how confident do you feel in your knowledge of the organization and its programs/services?

- 1. Not at all confident
- 2.
- 3.
- 4.
- 5. Very confident

5. Does the full Board discuss the annual budget before approving it?

- No
- Yes
- Unsure

6. Does the Board regularly monitor actual performance vs. the annual budget?

- No
- Yes
- Unsure

7. Does the Board review and discuss the annual audit (if one is required)?

- No
- Yes
- Unsure
- N/A

8. Does the Board review the Form 990 before it is sent to the IRS?

- No
- Yes
- Unsure
- N/A

9. How confident are you in fulfilling your financial oversight responsibilities?

- 1. Not at all confident
- 2.
- 3.
- 4.
- 5. Very confident

10. Do you make an annual financial contribution to the organization?

- No
- Yes
- Just joined the Board

11. Are you aware of any written policy that requires Board members to "give or get" financial contributions?

- No
- Yes
- Unsure

12. Do you participate in fundraising activities, such as attending fundraising events, selling tickets to events, cultivating donors, making asks, providing names of potential donors, etc.?

- No
- Yes
- Just joined the Board

13. Overall, how well does the Board assume its fundraising responsibilities?

- 1. Not at all well
- 2.
- 3.
- 4.
- 5. Very well
- Unsure

14. How effective is the Board's process for planning for the organization's future?

- 1. Not at all effective
- 2.
- 3.
- 4.
- 5. Very effective
- Unsure

**15. How well does the Board create policies that provide the Executive Director with guidelines and expectations on managing the organization?**

- 1. Not at all well
- 2.
- 3.
- 4.
- 5. Very well
- We do not have an Executive Director or the equivalent (regardless of title)  
*(Skip to question #20)*
- Unsure

**16. On the whole, how much does the Board trust the Executive Director?**

- 1. Not at all
- 2.
- 3.
- 4.
- 5. Completely
- Unsure

17. On the whole, how much does the Executive Director trust the Board?

- 1. Not at all
- 2.
- 3.
- 4.
- 5. Completely
- Unsure

18. Does the Board annually evaluate the Executive Director's performance?

- No
- Yes
- Unsure

19. On the whole, how much do the Board and staff (beyond the Executive Director) interact?

- 1. Not at all
- 2.
- 3.
- 4.
- 5. Quite a lot
- Unsure

20. How effective is the orientation program for new Board members?

- 1. Not at all effective
- 2.
- 3.
- 4.
- 5. Very effective
- Unsure

21. How effective are Board meetings?

- 1. Not at all effective

- 2.
- 3.
- 4.
- 5. Very effective
- Unsure

**22. How much does committee work enhance Board functioning?**

- 1. Not at all
- 2.
- 3.
- 4.
- 5. Completely
- Unsure

*Feel free to explain briefly your answer:*

**23. How effective is the Board's composition, in terms of expertise, demographics, connections, personalities, etc.?**

- 1. Not at all effective
- 2.
- 3.
- 4.
- 5. Very effective
- Unsure

**24. Does the Board enforce its term limits and rotation policies as stated in the by-laws?**

- No                       Yes                       Unsure

**25. Please indicate five topics that your Board regularly discusses at board meetings:**

- |                                                                      |                                                         |
|----------------------------------------------------------------------|---------------------------------------------------------|
| <input type="checkbox"/> Board performance                           | <input type="checkbox"/> Legal concerns                 |
| <input type="checkbox"/> Daily Operations                            | <input type="checkbox"/> Executive Director performance |
| <input type="checkbox"/> Financial health                            | <input type="checkbox"/> Fundraising                    |
| <input type="checkbox"/> Mission                                     | <input type="checkbox"/> Personnel                      |
| <input type="checkbox"/> Strategic plan                              | <input type="checkbox"/> Programs and services          |
| <br><input type="checkbox"/> Just joined Board                       |                                                         |
| <br><input type="checkbox"/> Please list other(s), if there are any: |                                                         |

**26. What do you see as the Board's area of greatest strength?**

27. What do you see as the Board's area of greatest vulnerability?

28. If you could change one thing about how this Board operates, what would it be?

## **Board of Directors Self Assessment Results**

- A. Please rate the quality of issues discussed today on a scale of 1-5 with 1 being trivial and 5 essential.**
  
  
  
  
  
  
  
  
  
  
- B. Please rate the quality of background materials you were sent with 1 being poor and 5 being excellent.**
  
  
  
  
  
  
  
  
  
  
- C. On a scale of 1-5 with 1 being operational and 5 being strategic, please rate the discussion at today's meeting:**
  
  
  
  
  
  
  
  
  
  
- D. What might we have done differently to improve our meeting today?**
  
  
  
  
  
  
  
  
  
  
- E. In light of today's meeting, what are the most important topics we should address at our next meeting?**
  
  
  
  
  
  
  
  
  
  
- F. What was the most valuable contribution we made to the organization's welfare today?**