

How To Build an Effective Nonprofit Board: The Complete Guide

About This Guide

We've created this guide to provide ideas, insight and resources for Board Chairs or the staff coordinating a board at an association, club or nonprofit. We hope this guide helps you invigorate your board, so that board members are engaged, fully participating, and the team operates at optimal capacity to help move your organization forward.

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Tips for Developing a More Effective, Engaged Nonprofit Board

The members of your board of directors are your standard bearers, foundation builders and strategic planners. They are the public face of your organization and act as your chief cheerleaders and fundraisers. The board is also responsible for steering the organization towards meeting its mission and ensuring its financial stability. At many small, volunteer-led associations, clubs and nonprofits, the board may also be responsible for day-to-day operations.

Given the important role the board plays, it's not surprising that challenges with board recruitment, management and engagement topped the top 10 topics identified in our Small Membership Survey. One of the key questions survey respondents (who were predominantly from volunteer-led organizations) asked was:

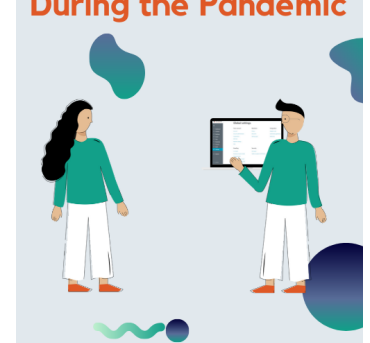
"How do you get board members to step it up so others don't have to do all of the heavy lifting?"

We've also heard this from members of our Small Membership Advisory Community. They've asked us:

"With a few board members doing all of the work, how can you get all of the board members to participate?"

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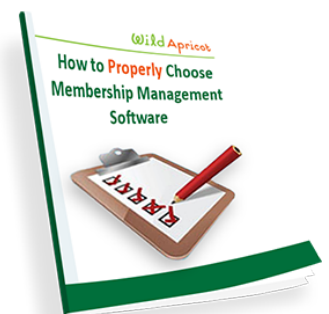
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"How can you engage the entire board?"

The Boards of staff-led organizations don't fare much better. [Daring to Lead 2011](#), a report produced by the Meyer Foundation and CompassPoint, also found that for those organizations run by staff, only 20% of the executive directors surveyed reported being "very satisfied" with their boards, with 48% being only "somewhat satisfied."

The Ultimate Meeting Minute Checklist for Membership Based Organizations

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**So it seems that there is some work to be done in the boardroom!**

If you are the Board Chair of a volunteer-led organization, or a staff person coordinating the board, we hope this guide helps you invigorate your board, so that it operates at optimal capacity in order to help move your organization forward.

In this brief guide, we've assembled a compendium of information and resources to help those in associations, clubs or nonprofits looking for strategies to energize your board. We'll go over what to expect from a board, how to manage your board, how to improve some key workings of your board to increase overall effectiveness, and finally, we'll share some useful resources and sample forms.

Let's start by trying to understand what is expected from boards in the first place.

Setting Board Expectations

Most boards of directors of associations, clubs and nonprofits are comprised of individuals from different walks of life and varied professions. They have joined the board because they want to contribute in a meaningful way to their profession, industry or society in general. Some folks are also looking for networking opportunities, leadership experience, or simply for social interaction.

We have to recognize that board members are volunteers, many of whom may have little experience with this type of position. For many board members, being in a leadership or management role may not come naturally.

Since your board is full of different people, all wanting different things, setting up and communicating clear expectations is a good idea for all involved. Your board members should be aware of their roles and responsibilities towards each other as well as to the organization.

It's important to note as well that the expectations will vary from organization to organization. For example, the board members of a nonprofit organization are expected to be [major donors and fundraisers](#) for the nonprofit, as well as understanding the additional [legal expectations and standards](#).

Nonprofit and NGO consultant [Simone Joyaux](#) (Joyaux & Associates) says all boards should develop [performance expectations policies](#) as a way of laying out what is expected from each board member.

Expectations from boards will vary depending on the type and nature of the organization. For example, the boards of charities and organizations with nonprofit status can have additional [legal expectations and standards](#). But the overarching role of the board of a membership organization is to establish the direction and policies to serve the needs of its members.

High level board expectations

Based on the expectations suggested by Joyaux, here are our top 10 things your board members should commit to in their role:

1. Believe in and be an active advocate and ambassador for the values, mission and vision of the organization.
2. Work with fellow board members to fulfill the obligations of board membership.
3. Regularly attend board and committee meetings.
4. Prepare for these meetings by reviewing materials and bringing the materials to meetings.
5. Keep informed about the organization, its issues, and its connection to the community.
6. If applicable, help support the charitable contributions operation of the organization (e.g., donations and/or fundraising).
7. As appropriate, use personal and professional contacts and expertise to benefit the organization.
8. Be available to serve as a committee chair or member.
9. Work in partnership with and respect the authority of the organization's leadership staff.
10. Agree to step down from board position if unable to fulfill these expectations.

When and how to set expectations

It is important to communicate these basic expectations to all current and aspiring board members as they start their term. By doing so, you remove any ambiguity within the organization. Roles are defined and responsibilities are assumed. Real work can be done and progress can be made.

But if your board is already mid-term and functioning without clear roles and expectations, you might want to introduce them at your annual strategic planning meeting. Since this is a time when you are planning for the coming year, establishing priorities and setting goals, it's important to let the board know what is expected of them. Having a quarterly or biannual reminder can also be useful, especially if there are changes to board personnel.

Now that you have established expectations, let's look at various ways to improve your current board's effectiveness.

Improving Board Effectiveness

A few years ago, we asked Patricia Hudson of the [Melos Institute](#) to offer up some advice in the wake of the "Daring to Lead" survey (noted earlier). She offered the following thoughts on effective board development and realistic expectations:

"Being an exec in any nonprofit is a tough job. Working with a volunteer team that constantly changes presents real challenges. What is remarkable about most volunteers, however, is their desire to be effective. Yet over the years, most of the focus is on asking volunteers to do less....expect less. We might just be pushing them away rather than tapping their potential...and giving them an enriched experience. People choose how they spend their time. The more we focus on leadership training and development, the more confident they become....and the more we can expect great things from our volunteer counterparts."

"It's never too late to improve board performance with training"

"The good news," Trish suggests, "is that any organization that is still afloat can improve its performance with training. You may have to bail hard, but you won't sink. If well-planned and

executed (with a more concentrated focus) the results can offer dramatic changes allowing the organization to achieve the significant advancements outlined in your strategic plan. If you're going to dedicate precious resources to establishing a planning process, be sure to include opportunities to cultivate the potential within your membership that will be necessary for its implementation."

If you believe, as Trish Hudson does, that "leaders are not born but are trained," you are on the road to managing your own expectations and can develop training plans to ensure your board members are on the same track. That way, everyone understands their role, knows what is expected of them, and has the necessary skills to function at peak performance – both individually and as a group.

Board Orientation

A board orientation can be the first step in training leaders and setting expectations.

Having responsibilities, time commitments, procedures and decorum laid out and agreed upon can mitigate potential conflict and help the board team start off in a cohesive manner.

Developing a simple board orientation manual can be a great way of introducing new members to the system or even as a refresher course for long-standing board members. These manuals can be as complex or as simple as you see fit. Large organizations with big budgets spend considerable money putting together lengthy and long lasting physical manuals. Many smaller organizations prefer a simple document outlining the essentials.

Either way, here are some things to consider including in your board orientation:

- Mission and vision statements
- Organizational history
- Bylaws and policies
- Strategic plan
- Financial summaries
- Board information
- Committee information
- Meeting processes

This is just an outline or starting point. Organizations such as nonprofits or charities will also need to orient the board as to their specific legal and financial duties based on government regulations. The manual can also be turned into a presentation which will make it easier to share the information with the entire board. You may choose to present the manual at the start of the year, in your strategic planning session, or go through it with each new board member individually as they join your team.

Managing Your Board

Before we delve into some areas of improvement, let's talk about managing your board.

In his book, [*On Becoming A Leader*](#), Warren G. Bennis wrote: "Leaders are people who do the right things; managers are people who do things right."

Thinking like a business manager might be helpful when trying to set expectations and manage a team. Managers work to ensure that the vision and goals of the organization are being met using practical techniques.

Here are some team management techniques that board leaders might want to apply:

- **Delegation:** Matching people and tasks is the key to delegation. Making sure that board members with the right skills are working together on appropriate reports, agendas, initiatives, or committees will tremendously increase productivity.
- **Motivation:** Understanding the interests and needs of your board members is key to motivation. Knowing what they expect and value can help you to keep them motivated and interested
- **Participation:** Group dynamics can impact the productivity and enjoyment of your board, so making sure that some members don't dominate conversation is key. Making board members feel involved and free to have their say can do wonders for morale and productivity.

Keeping those management techniques in mind, let's look at some areas that might be improved.

Effective Communication is Key

Improving communication – among board members, with staff and other volunteers, and also with the membership at large – can be a critical factor in improving the board's effectiveness. After all, in order to fulfill its mandate to serve the interests of its members, your board needs to be well connected to one another and have its collective finger on the pulse of the organization as a whole.

Relationships and communication among board members crucial for success

Research has confirmed what we all suspected – that board members' relationships with one another have an impact on the group's overall abilities and success. In the Harvard Business Review article, [The Key to a Better Board: Team Dynamics](#), Solange Charas tells us:

...the quality of board members' interactions are crucial to board success. In an earlier study [described on hbr.org](#), I found that board members who didn't know each other before joining the board were more likely to engage in productive cognitive conflict. This finding helped craft my subsequent research inquiry: What impact does board dynamics have on financial outcomes? My research provides strong evidence supporting three findings:

- "Cultural intelligence" of individual directors, or their predisposition to working well in teams, is critical in generating high-quality team dynamics (more below);
- The quality of board-level team dynamics is highly correlated with firm profitability; and
- Boards that are able to function effectively as a team have an 800% greater impact on firm profitability than any one well-qualified board director – in other words, and consistent with Aristotle's observation, the whole is greater than the sum of its parts.

When the board is able to work together and community in a cohesive fashion, they will be more successful in driving the organization as a whole in a productive direction.

Communication tips to consider:

To keep the board communicating – with one another and with the rest of the organization – consider making these practices routine:

- Focus meetings on strategy, not just administration – get new initiatives going!
- Invite candid discussion
- Break up into smaller groups to discuss
- Make it easy for the board to understand by using visual aids and handouts
- Invite members and benefactors to have their say

- Engage volunteers and members

Implementing these communication strategies can help your board solve problems more quickly, use their limited time together more effectively, and think outside the box to promote growth and engagement for the organization in general.

Listening to and communicating with members also important

In his book, *Boards that Work*, [David Fishel](#) suggests that boards need to:

"...get a close-up understanding of the operation in order to be able to stand back and play a productive role at a higher level. Without some organisation and sector knowledge, the board's decisions will lack context and could be misguided."

It's important for the board to listen to members and volunteers who are on the ground in order to gain context. This means setting up channels to make sure that the board is connected with the organization's members, volunteers and staff.

Think about whether your board is getting the information it needs by asking questions such as:

- Do we receive information that helps us understand whether we are achieving our mission?
- How useful are reports? Do they help the board to focus on key issues?
- What discussions have we had with members that have resulted in meaningful progress?
- How do we encourage members to share bad news as well as good?
- Are we receiving information we do not use or need?
- Is the board easily accessible by everyone?

Once you have answers to these questions, make an effort to investigate the causes of any communication breakdowns that are occurring. Committees can be a great tool here to figure out unique problems in your organization and suggest solutions.

It Pays To Plan

Your board members are busy people. This means the time spent together must be maximized to the fullest extent. Planning in advance for board meetings is key to ensuring the group's time is optimized. This takes some effort from both the leadership and the members themselves to ensure board meetings are always carefully planned, facilitated and documented, so they can be focused and efficient.

Tips for getting the most out of nonprofit board meetings

Here are some steps that can help your board get the most out of your meetings:

1. **Have a clear and focused agenda:** Send out an agenda with meeting discussion topics and goals to board members a week in advance. This gives them time to prepare their thoughts and statements and makes sure that there is no time wasted during the meeting.
2. **Stick to the agenda:** It can be very easy for board members to go off topic. Make an effort to stick closely to the agenda so as to not waste the board's time.
3. **Homework:** Send out articles and resources that add value to the discussion topic or issues at hand in advance. This gives time to board members to educate themselves and be on the same page during a meeting.
4. **Schedule time for committee check-ins:** Time is of most value. Build time into your schedule to hear updates from committees – talking points can be added for discussion into the next meeting's agenda

Don't be afraid to empower the chair of your board or yourself to lead meetings. It's easy to get distracted by side conversations, especially if your board members are all friendly, so make sure that someone has the authority to bring your members back in when they get off-topic.

Read More: [7 Secrets For Successful Board Meetings](#)

Make the Most of Meetings

Having an agenda is just one piece of the puzzle. As noted earlier, boards are filled with people from different backgrounds wanting different things. Butting heads, personal agendas and differing opinions can lead to delays and wasted time. Sometimes cooler tempers prevail and it's business as usual, but then board meetings can get, well, kind of boring if all the group does is review what was discussed or agreed upon at the last meeting.

Here are some do's and don'ts of running a great board meeting:

Do's

- Start and end meetings on time
- Have name badges and introduction periods for new members or guests
- Send out board materials (agendas, articles, resources etc.) a week in advance
- Allot a specific amount of time for each agenda item
- Move things forward – find solutions to fast track new initiatives
- Keep minutes – to track progress. [Download our Ultimate Meeting Minute Checklist for Associations](#)

Don'ts

- Waste precious meeting time going over the last meeting's decisions or discussion
- Allow board members to chat about irrelevant matters
- Let the board discuss day-to-day operations
- Allow contentious opinions to hijack the meeting

Need some tips on organizing a remote meeting for your nonprofit board meetings?

The folks over at Hubstaff have put together a great infographic on [8 Keys to Running a Successful Remote Meeting](#). Here is a summary:

1. Be prepared
2. Choose a medium
3. Prepare the tech
4. Share your screen
5. Stay on track
6. Include everyone
7. Know the etiquette
8. Start and end on time

Remote meetings might seem like a hassle, but they can be effective for keeping your organization running smoothly, especially when your board members are busy or traveling.

Robert's Rules of Order might help

In a recent [Small Membership Advisory Community](#) discussion, there were a number of issues raised about conflict that can arise when the board's procedures aren't clearly established. While many organizations adhere strictly to [Robert's Rules of Order](#) in conducting their board meetings, others had taken a much more casual approach due to the nature of their small and friendly board. It was suggested that there is now a version that applies to small boards and that having these specific procedures in place can prevent misunderstandings and conflict.

Brenda Asare also mentions the new paradigm in board meetings is to have evaluations after every meeting. Even an informal discussion can provide an opportunity for your board to reflect on the engagement, participation and effectiveness of every meeting. This instant feedback will help the meetings get more productive over time.

See the [Additional Resources](#) section for some evaluation form examples and templates.

Call On Committees

Sometimes a new chairman or president inherits a board that may be a little set in their ways and needs a jumpstart in order to get things done.

Breaking into smaller groups to create board committees can be extremely useful when you are trying to reduce monotony and discuss larger issues. By operating in smaller groups, board members can often accomplish much more.

In a recent blog post, board expert Les Wallace says it is vital to utilize committees to their fullest:

"A committee's job is to get into the weeds, and report back to the board. Committees start the conversation. Trust your committees. Let them digest the large reports, and add what needs to be discussed to the agenda."

Planning for committees doesn't need to start during the initial strategic planning process. If you think a new task, problem or issue can be tackled using committees don't hesitate to put forth a motion to create one.

Tips for committee development

Here are some things to keep in mind when developing a committee:

- Ensure the committee has a specific set of tasks and a specific goal
- Be open to having non-board volunteers as members of the committee
- Consider having at least one or two board members on each committee
- Make sure not to burden members by expecting them to participate in too many committees
- Be mindful of the time commitment required by members

Your committees don't have to be permanent, either. Use the formation of committees on an ad-hoc basis to solve problems or plan events as they arise. This strategy can also encourage board members to get involved in new things — they can try out being on a committee for a certain issue without being permanently involved.

Evaluate Everything

Your board should be doing its job as set out by your organization's mandate or bylaws. The best way to make sure they are on track is to assess whether or not responsibilities are being fulfilled and goals are being achieved.

In their guide, "[20 Questions Directors of Not-for-profit Organizations Should Ask about Board Recruitment, Development and Assessment](#)", The Chartered Accountants of Canada, suggests four main areas of evaluation:

1. Leadership
2. Procedures and resources
3. Dynamics
4. Relationships

As a starting point for board evaluation, consider asking yourself some questions under each of these areas:

Leadership

- Are the board members performing their roles and duties?
- Is the board and its members performing as expected?
- How successful is the current chair of the board in running the board and the organization?

Procedure and resources

- Are meetings organized and frequent?
- Do committees have appropriate resources? Are they effective?
- Are directors and board members being educated on rules and procedures?

Dynamics

- Do board members get along? Do their attributes and skills complement each other?
- Are meetings and discussions progressive and constructive?
- What are the dynamics at informal gatherings (dinners, parties, retreats, etc.)?

Relationships

- How does the staff view the board?
- What is the relationship between the board and members?
- Do the members and the staff trust the board to make the right decisions?
- If your organization is a chapter with regional or national boards, how is your board's interaction with these?

The mode in which you carry out these evaluations can differ. Formal approaches such as having a questionnaire or survey can be a great way to document and tracking progress. Less formal approaches like quick post-meeting surveys and discussions are useful too – as long as the information gained is being recorded and used to make meaningful, positive changes.

Read More: [8 Types of Annoying Board Members](#)

How to Build an Effective Nonprofit Board:

Conclusion

In order to bring about meaningful changes to how your board works, it's important to start by understanding what the board is made of. Most volunteer boards have a unique set of skills and therefore unique expectations. Understanding the individual members and team dynamic will help you devise some tactics to kick-start your board.

Since your volunteers are from different walks of life with different skills and expectations, start off by clearly setting board expectations. Each member should be aware of what their role is on the board and how they are expected to fill that role.

After setting expectations, there are some key areas to target when trying to improve board effectiveness:

- **Clear Communication:** Aim to have clear communication between all parts of the organization.
- **Planning:** Plan using agendas and scheduling tools to make sure everyone is on the same page.
- **Effective Meetings:** Every second counts – make the most of the board's time together.
- **Use of Committees:** Committees can start the conversation and digest big issues quickly – a great asset.
- **Implementation of Evaluations:** Make sure the board is introspective and keeping track of the progress they are making.

We hope you use this guide as a starting point to make some meaningful changes to energize and engage your board.



Additional Resources:

- [Ineffective Board Members in a Nonprofit Organization](#) – (Because Your Board Matters)
- [Effective Board Meetings](#) – (Wild Apricot Membership Knowledge Hub)
- [How To Write Effective Meeting Minutes](#) – (Wild Apricot Membership Knowledge Hub)
- [Today's Board Orientation Just Isn't What It Used To Be](#) – (Wild Apricot Membership Knowledge Hub)
- [Twelve Responsibilities of Board Members](#) PDF – (Human & Organizational Understanding & Development)
- [Why Board Members Need to Understand ESG Standards](#) — (Directorpoint)

Sample Board Self Evaluation Forms:

- [Board of Directors Self Evaluation Form](#) – (managementhelp.com)
- [The NonProfit Organization Self-Evaluation Checklist](#) – (Ginsler & Associates)

Sample Board Meeting Work Plan:

- [Sample Board Meeting Work Plan](#) – (Cause & Effect)

Sample Meeting Agenda:

- [Sample Board of Directors Meeting Agenda](#) – (managementhelp.org)



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