



BRADY WARE

## **Spring 2023 Take Five Nonprofit Conference with Cindy Cheatham Taking Your Board from Good to Great Transcript:**

Good morning everybody it's a pleasure to have this opportunity to speak to you I know there may be some friends on this call and I hope that all of you will have an opportunity to take away something today that you can put to use to make an impact in your community it's great that Brady Ware and Company is committed to investing in non-profits and then take seriously that board leadership is a huge part of non-profit success very briefly I love the opportunity to work for a living to work with non-profits and Community boards that serve on many boards so I have to eat my own dog food and live it out each day what we're going to talk about today the three main topics one is not to take for granted the importance of your board service it's really important role it's not something to take lightly and you can have a great impact but it's also a great responsibility we're gonna then look briefly at keyboard rolls and how boards are doing to help you provide some context and we'll be asking you to chime in on how well your board is doing and then I'm going to walk you through a simple process of four key steps to take your board uh from where it is today to even higher performing and finally we're going to end with some q a and Melissa Missy and I will address your questions at the end

Kara already gave some housekeeping but please be ready I'm going to ask each of you at the end too to put into the chat what one commitment that you may make from this this Workshop today that you can take back and put to work and you will get a copy of these slides afterwards so first the importance of board service or uh as much as we love our non-profit CEOs and leaders the boards are what helps our non-profits to endure and sustain themselves over decades and we know some non-profits are several hundred years old the foundation of so many of our institutions in America come from non-profits whether they be universities hospitals the nursing profession and many others so your work is really important um what does it give you as you do it well and you engage in it and you recommit to it you uh you provide you get connections to a network you have the opportunity to learn when you challenge yourself to roll up your sleeves and get engaged and to uh even tackle difficult challenges within your board or within your non-profit uh the leadership development opportunities as I work with several corporations to put to put their leaders onto non-profit boards they see the benefit and then an opportunity to impact your lives so it's important to keep these motivations in mind as after all you are a volunteer and you have to refuel yourself as you commit to this work

so governance matters and it's challenging the non-profits and Boards as you know even corporations had to Pivot during the pandemic to a new way of working and handling the uncertainty of income putting



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it putting events on hold and figuring out how to do virtual events there's competition for talents even more so in non-profits as it's challenging to compete in the first place without having the financial other rewards um so that's a challenge there's an expectation and an opportunity to continue to advance our Deni and there's also of course inflation and economic worries

this is a model that that um it may look kind of complicated but what I want to share with you is that the role of a board can be can be challenging to understand but at the end of the day the CEO um in the middle of the slide on the left is the linchpin between the board and the staff the board is a partner with the CEO in partnering on centrally governance and Mission impact strategy funding policy um and the CEO is the one responsible for the staff so there is a clear line of responsibility day-to-day responsibility for staff and operations and implementation as in the CEO's hand but the board has a critical role in the mission impact working hand in hand with the CEO and the staff to set the strategy and to ultimately be responsible for the mission impact that's the 501c3 status that you get as a non-profit and you have those legal responsibilities

Ford's doing you could see all of you many of you most of you probably on this call are used to getting A's maybe a few B's but mostly A's the reason we work on boards is because it does take intention to optimize the way that we work um as a board coming together infrequently as volunteers to do important work requires some intention and that's why we invest in board development that's why we take the time to do these kind of webinars that's why we recommend that board source and others recommend that every couple years you do a board of self-assessment and say how are we doing and what where are we going as a board and what how can we better organize ourselves we do okay on Mission because we have passion for Mission and that's the reason a lot of times we come to the board's work we particularly struggle in the area of building our own board it's it competition for Talent on the board competition for individuals who are willing to lead is a challenge and also fundraising is intimidating to a lot of board members and it's really a team sport between a CEO their development team the staff and the board doing it together and just like in for-profit fundraising and sales not every board member has the same guests or Talent so it needs to be it needs to be customized for the individual board member many ways that you can contribute now I'm going to stop a minute and Kara is going to run a poll for us I would like to ask each of you to step back and reflect how do you evaluate your board's overall performance a is I would call excellent or outstanding um B is good C is let's call it okay or moderate so if you can just take a moment I would appreciate if you can give us this answer and see how we're doing as a group okay wow



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we have we have a few tough graders out there so it looks like everybody but um even the three organizations you can always improve but it looks like all of us agree that there's opportunities to go from okay moderate and even good to great so that's why you're here today and I look forward to um asking you later how you're going to work on that together

okay um you can feel free to put some of your response in the chat as you gave yourself a score for a board there was probably one or two or a handful of things that were on your mind for why you think the board performance is not where it needs to be um common things like just people being busy and such so feel free to comment but I'm going to go through what some of the typical challenges to a board in terms of performance look like so that we can be aware as we work on this together that these issues are common yet nonetheless there are some very outstanding boards and many of the best non-profits do have those outstanding boards so it's we can keep working on this one is role confusion and complexity there are a number of responsibilities of a board and how do we break those down in such a way through officer roles committee chairs and good agendas so that we can put that that role to work um time and lack of leadership um leadership in particular the few handful of leaders on a board are critical to setting an agenda and creating an environment um of engaging others and structuring the work and so it's really critically important to have good leadership value and meaning are we coming to board meetings where there's some meat and potatoes on the on the table or is it just a bunch of reporting how well are agendas providing that sense of meeting are we working on refreshing and developing the board do we are the same people are we doing the same things or are we are we working on getting a game plan for our board for how we can make a difference we're not we may not be evolving and changing organizations just like businesses go through different stages of change and it's an intentional process and finally simply are we being intentional about um what a good board looks like for us and what this current Board needs to needs to contribute to the organization

just like a recruiting process is for an employee same thing for board development we have a circular process of having to uh engage we want to identify and cultivate what kind of board and board members and composition size, etc. We need to have for our organization then we need to strategically recruit and slate officers and leaders in the right place to put that Talent together um we need to orient involve and educate evaluate and that's part of what we're talking about today you know your participation is product process of helping to evaluate and then we need to rotate and we need to continually invest in engaging



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our board not just as a whole but individuals within those boards so if you're a board leader that engagement and that process of talent management and talent identification and individually harnessing that Talent or if you're a committee leader that is your responsibility like it is in any kind of setting where you're a leader so now we're going to shift to how do we go from okay moderate toward great um how do we pursue steps to a better board the four key steps and this comes from one of my colleagues that I worked with at Georgia Center for non-profits when I was running the Consulting there and working on governing um it is a process as we discussed earlier of being intentional one is yes there's lots of responsibilities of the board but it's also like a good team finding your right Focus second um once you find your focus how do we structure it to put that to work and oftentimes we may be lacking Talent we need to Marshal more Talent or we need to motivate individuals within the board who have been untapped for their talent because there hasn't been the right Focus or the right structure and we also need to build good strong working relationships among our board members board leaders and then with our CEO and any of the staff Liaisons that partner with our board to do the work so first step one finding your focus a key question that all boards need to ask themselves is why are we here what does success look like for this organization and this board that's one of the most fundamental questions um that a board can ask secondly how does the board this board need to focus given the current context of the organization there are situations that's why we do periodic strategic planning and situation analysis that do lead to helping you develop that Focus also how do we hold ourselves accountable we all know that the best organizations strive for uh achievement and part of that comes with both freedom but also accountabilities what are some examples of a focus these are some examples of one key Focus boards are not used don't usually have the luxury just to have one but usually there's one that can pull the team together that's really critical an example would be and many non-profits are run by Founders there's a baby boomer generation that is continuing to retire right now um even if they're not at retirement age a lot of times they need to move on as founder so an example would be you have a founding or a long time Edie that's retiring that is a point of great opportunity and also vulnerability for a non-profit as non-profits don't typically have a deeper bench and frequently don't have an internal successor that's ready to step in so an example of the board Focus would be that the board has to work on succession planning including usually this means that they need to step up in the transition frequently founder-led organizations do have strong leaders and sometimes the board is not as strongly partnered with the founder and driving the strategy in the organization so it's a combination of succession and frequently bored board development and board maturation that takes place during these periods another example is when you have Financial challenges I'm working with the CEO right now as a coach whose organization has been running a deficit for many years this is a new leader and she needs to partner to try to figure out how to



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run a um the budget in the black and so that's a partnering effort the board has to step in to look at Mission versus money and be willing to partner with that CEO to say you know we can't hold on to things um that when they lose money or if we do we need to figure out how to step up and step up our financial giving in order to keep this this program or this activity dashboard I talked earlier about accountability how is our board in terms of our Focus having a dashboard that looks at things like how are we accountable to our engagement um meeting attendance may sound simple but it's important if you have people kind of taking for granted the basic work of working together um then and you have people coming and going and some people never showing up and can be quite discouraging and can have kind of a slow impact on demotivating the board uh to participate so your board meeting attendance your committee meeting um participation your individual member attendance looking at these things but also what is your dashboard of the handful of at the bottom and these slides will be made available to you the handful of strategic goals that the organization's working on and usually the board has some role also some organizations not all they not only set a goal of the best practice is for 100 giving among board members individuals on the board should all give a gift from their own personal pocket and Foundations look for that but sometimes go boards set a goal for the board as a whole and sometimes they have a challenge gift within that within that goal this is especially useful if the organization really does need to raise funds and it's tied to uh it's particularly motivating the boards if it's tied to some strategies and some impacts that you've been part of developing okay step one was Focus now step two now that we have our Focus let's look back at our structure and how that structure can support us putting this Focus to work we need to go back and revisit our leadership roles and responsibilities um as a whole and refocus on what those look like if we haven't had active committees um this may be the time to revisit those and to look at their Charter and it may for example if you're doing succession mean that you need to put a task force together a transition task force or succession task force uh looking back at the composition the decision Authority and how you're gonna work together to make those committees um collaborate for success and then you need to match talent to roles and if you have gaps of the talent that that leads to identification of strategic recruitment opportunities I've worked with non-profits who have not had a successor chair um or vice chair and sometimes had to go out and recruit for a chair um it doesn't mean that they always go straight into chair sometimes they go into a vice chair role and you convince the chair to spend one more year but um those that strategic recruitment is quite important sometimes too and then where does the rubber meet the road of focus then tying to that structure it's when the committees or the task forces also identify one or more goals that they're going to work together to implement and some accountability there



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so aspects of structuring for Success generally I recommend that you have three to five committees for an average of a 12 to 18 person board of course boards can vary in their size and composition there are some giant boards uh particularly for large institutions like Junior Achievement or museums and such but frequently if that's the case they have an executive board that is more like the 12 to 18 person board I also think really a powerful aspect of board development um on an ongoing basis especially in this step one two three four process is if you don't have a governance committee and I would recommend you can keep it governance I like the word board development because it implies an active process an ongoing process um and governance can sometimes be considered just policy you create a board development committee whose work is to come alongside the officers and regularly pay attention to the to the board and how it's functioning and to support things like orientation um strategic Recruitment and such other common committees include Finance development fundraising and executive and if you do have executive which um which is a frequent committee be careful that the executive committee doesn't do the work of the board that all that work should one you should invite committee chairs to those executive meetings and two the executive committee should not make decisions of the board if they make emergency decisions those should be brought to the board for a vote and any of the work of the executive committee should be transparent uh to the to the full board nonetheless executive committee can quite can be quite powerful in coming together more regularly to provide coaching support and to move things along and to plan powerful agendas common task forces could include uh succession or transition Capital campaign or strategic planning

after you develop a plan find uh find a structure sometimes you need to in an ongoing basis you need to continue to Marshal more Talent if you recall earlier to how the boards are doing board composition and recruiting was one of the lowest areas of success there's competition for talent and it takes it takes effort to go outside of your own just immediate Network to say what do we need what's the composition what's the what's the talent What's the diversity and is somebody also willing and able to lead and not just show up um so it's important to ideally um always have kind of a leader pipeline sometimes you can do that by having committee members that are non-board members the way that your organization engages its volunteers and if it doesn't have volunteers that can be quite helpful to develop a pipeline your corporate uh corporate relationships and Partnerships out there you should always be looking for talent and even partnering with your staff and helping you look for talent you should um consider again reassessing your



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board size and composition using the Matrix what do we know about the current demographics of our board in terms of their age their skill their talent their race and other composition um so that we can find what the gaps need to be you always need people with certain skills and talents but you also need some people with time and willingness to lead so that's don't forget those aspects of who you're going out to recruit and then ultimately um having a strategic board nominations to recruit for that for that profile of who you're targeting and it's not just that that board nominations committee it's everybody but that committee is particularly developing the recruitment plan and it is a recruitment plan it's not just grab the first person that Bob or Joe or Sally knows it should be strategic

once you um once you find those members oriented you should Orient them to the organization the people this is a bit harder in in Cove at times when boards are meeting a lot of times they're meeting infrequently they're um meeting online it really is imperative and important that your board members do get an opportunity to see the mission to touch the mission so to the extent that you can bring that mission to them and make sure you do have some in-person meetings for those connections to the mission into each other that's really important assigning new members uh to best meet the organizational needs asking them what their preferences are providing mentorship and helping those new members find a place to contribute and then you know the volunteers the volunteer management is uh recognized and reward and hold volunteers accountable it's all those things that you do with staff the differences they're unpaid but nonetheless when we all know that when we take something seriously and when we know that we're needed uh and there are expectations We rise to the occasion more likely

finally step four building working relationships we need to build a common understanding of the board and CEO role including some lines of authority mechanisms for building trust and collaboration in areas of co-leadership this this can challenging it can be challenging um for a lot of reasons including just in general partnering and relationship building um and control are common challenges and of humans working together whether it be in our home or our workplace at the chair of the organization is a really important relationship to um also have that relationship to the CEO where it's support and accountability so it's important that if you as a nominations committee are involved in that process of trying to motivate and select a chair that the CEO also has a role in that because that chair um needs to partner well with the CEOs sometimes board chairs and CEOs meet as often as weekly um and that's just an important relationship and if it's if it's broken it can really create a challenge for the board to work well as a whole





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it's also important to invest to build productive relationships between the board and the staff leadership I hope that you uh can appreciate how hard the staff work and are eager to learn more about who's on the team and to encourage your CEO to not only help you get oriented with that but to make some connections to some of those staff leaders some staff CEOs regularly bring their executive team or regularly bring guests to their board meetings um that's not necessary but it can be helpful um so there so if you feel like you do need to get to know people don't be shy about um visiting the office or asking for opportunities to connect or even hearing some of the expertise that one of your board meetings from somebody in fundraising or somebody in program it's important that it's not just you and the CEO but the staff as a whole they also um the other relationship is that it's important that the board this is the best practice some boards avoid it but the you're there as a board to both support hire and also hold accountable the executive director to um accomplishing the goals that you're setting out and to the board um the job description of the CEO it's important that you agree to the mutual performance expectations and to the process of a review but that's something that is an important tool the best CEOs and Boards do find that to be a very help helpful healthy process we all like feedback and we certainly also don't want to find ourselves in a situation where performance is dragging and we're not willing to take action if there's an opportunity to improve or to have to make a change that's one of the hardest steps the board would have to do is to take um to give a poor performance review but it's also a responsibility um to the CEO to be able to adjust and work on those um areas of strength as well as areas of weakness sometimes getting a coach for them so that's an important best practice in building that working relationship it's also important that you invest in developing Clarity around key decisions so that you don't um micromanage and that you also don't abdicate responsibility so you know day to day hiring of a staff and day-to-day spending within the budget is clearly in the domain of a CEO but that doesn't mean that you can't have input to important spending decisions or important hires especially if it's a brand new hire that's adding um that's adding to your budget or a c-level hire um so it just like in a good organization understanding who's the decision maker who's a recommender and um who gives input to this process so if you as a board don't feel like you're getting adequate input um then it's okay to look at Key areas of decision making and to try to clarify that um it's also important to discuss expectations um just you know this happens frequently with the chair especially and to um if there's there if there are role issues to do role clarification that's just a healthy process between a board and a CEO some founder board members really want to minimize the role that the board has um and so that's really important to address because a board ultimately should have co-leadership and that's that won't happen unless you have those very





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clear honest discussions other CEOs will expect a lot from their board and it's important that the board clarifies what they need and what they can what they can contribute so it goes both ways that they're also um the board members should just like the CEO be willing to be assessed so if a CEO is going to be assessed for their contribution against their job description as well as their role in accomplishing the goals of the organization board members should also look at doing their own periodic review and the CEO should be invited to give feedback in that review

so essentially um it's important to create an environment to encourage honest constructive communication so that's what you want is we don't want to be stepping on toes um but we also don't want to be stepping on eggshells we need to be able to have constructive honest respectful conversations to address concerns or to clarify like you do in any good working relationship there's also something called this comes from my colleague Neil who was a psychologist I love it is just this zone of accommodation so it's not perfect it's not perfect always what the CEO versus the board's role is um that you need to provide some space for adaptation and compromise when questions arise so be flexible try to work it out but also be flexible uh on another uh note board members on the one hand shouldn't come in and have feel like they have the idea of the day that the CEO should immediately act on but it is important that board members uh can have what I would call constructive meddling that it's important that the board can have an understanding of the organization and takes the time to do that I just got done with the strategic planning uh process with one of the boards that I sit on and there was some gap between the board's understanding of the capacity of the organization and what the opportunity ahead for them was versus the non-profit that I sit on which is just a two-person organization and essentially is doing great but they're still at a stage of development where um there's a big gap between where some board members aspirations are immediately and where the organization is how can you get that understanding you can do it through some SWOT analysis but there's no substitute for going and going and visiting and putting yourself in the shoes of the non-profit itself seeing what it takes to run the operation um to spend time with the CEO to know what all the different multitude of things that they're doing every day and asking questions finally attending to the process um just you know how are we keeping people informed um how are meetings conducted how are we doing this work what's our process for planning good agendas uh planning um how we go about developing our budgets setting goals um the how um is important along with the what



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so now I'm going to um ask each of you to spend some time uh reflecting on this we talked about Focus structure we talked about the working relationships and marshalling talent what is one step that you want to be accountable for from this Workshop that you will take back to your board leadership to your board role to try to move your organization from where it is today to The Next Step so I'm going to pause and give time for each of you to uh to write that in the chat and I'm going to take a look at some of those chats

Lee don't just show up better Define roles and expectations evaluate the skills and Recruit new members thank you keep them coming a better board selection Matrix

a lot of comments around the talent and the gaps and need for leadership

communicate needs roles and improve recruitment

board member job descriptions and expectations

it sounds like um you know one of the things that happens with non-profit leadership sometimes in volunteer roles is we come to it um and sometimes we were either shy of speaking up because we're with our fellow volunteers or sometimes we come to it just thinking um we can just make a difference by showing up um and yes you do make a difference by showing up but again going back to the important role of a board this is and this is a big responsibility and so some of you um may need to assess whether or not you have the time and the energy to do this work on a board level because there are other ways that you can serve with some Hands-On volunteering but it is a big responsibility at the same time it's a great reward when I work with board members and help them self-assess and I asked them why do you come to board meetings why do you engage they put their hand up because they say because I know that I'm particularly needed that I am making a difference and so um reminding ourselves that that sometimes we are just taking for granted yes not everybody's gonna always meet our expectations there are going to always be the 20 to 40 percent of board members that do more the majority of the work the leadership um but um that doesn't mean that one that not everybody on that board can find one way to contribute



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meaningfully and two that we um we can't ask for more because when people step up and our challenge that's when they also find them the most reward so I'm going to give one or two more minutes

it sounds like a big theme Here is some basic simple setting some expectations having some accountability and making sure you do um have some of the right people for your board so I look forward to hearing how that goes

well thank you everybody for your participation today what I'm going to share with you is many of you did talk about trying to work on a board and um this is not a performance mate this is not a board Matrix but I'm certainly can provide a example of a matrix to you but I want to pull up if this works hey um this is the lead behind that I would encourage you to do as a simple step with your board is to do a simple board assessment and I this is designed around the four key practices of finding your focus board leadership expectations as well as strategic board recruitment so this is going to be a resource that I would encourage any of you that especially if you gave yourself a two or three take just a few minutes yourself and maybe bring to um your board leadership the opportunity to just do a simple self-assessment there's longer ones but get started somewhere and agree that you either need to go and do something more comprehensive um with a full online survey monkey with comments um and what what's the best thing about this board what do we really need to work on what should our Focus be you can add to this but if nothing else think about getting a handful of you on board to say yeah I agree that we could do better just like you could you gave yourself a two or three today and how can we move forward to do that together so that's a recommendation

um I also put an example of a board Covenant in this resources file with basically what how can we ask our board to be to be committed toward our roles and responsibilities it is a best practice that not only do you have a good board job description that identifies that but some of the best boards not only have a board job description but they ask their board members to sign kind of a Board responsibility Covenant even if it's just a simple one-pager that says I will I will commit to these roles and responsibilities I will commit to showing up attendance I will commit to my give and or get I will commit to serving actively on a committee I will commit to joining um to visiting the program and to be part of be part of key events as part of my Ambassador role things like that even if it's a simple one-page or some organizations have



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more details where they do things like how am I going to do my give and or get am I going to host a party at my house am uh am I going to help uh connect this organization to these three corporations so that's the tool that I have here um 12 principles of exceptional boards in terms of the culture of your board and how you are able to build those uh healthy relationships and then there's uh the preeminent uh resource that looks at board best practices and how boards are doing is board source and there's a there's a whole study on leading with intent that I've appointed you to there's also a strategy I would encourage you to do at one or more of your board meetings it's a simple Six Sigma process some of you might be familiar with Six Sigma but um one practice that you can put into place and maybe as a start in addition to this board self-assessment is just to say what is working within this board at the end of each board meeting what is a plus what is a positive from how we're working together as a board from how we're doing this work together and even from this board meeting and then the Delta part of that Six Sigma process is what can we change what could be improved uh and now it sounds simple some organizations do board meeting uh reviews at the end of each board meeting if you want to do that that's great but a simple process is just to start somewhere by asking what's working well what could be improved

so um thank you for your participation today for investing you're already above the above the line of great board members by investing in yourself and investing in this process I encourage you to take this Beyond yourself to the rest of your board if you're a CEO to bring it to your board you will have these materials um and I'm happy to also if there's something that you're missing something that you would like to get an example from me or have a follow-up conversation this is how you can reach me so we're going to move now into uh q a and Missy's going to help read some of the questions and uh we'll address your questions that are on the top of your mind right now well thank you so much for that presentation that was absolutely um fabulous um and I have like a thousand questions so I'm gonna start off before everyone starts getting theirs in there um you know I was a board chair of a very small organization and it was a working board and so there were a lot of expectations that we had it and we even had a form part of the me and the executive director would sit down with people um and this is what we expect this is what we need we need you to be a working board you must be on a committee and then I time and time again I would get people after signing the agreement they would do this and they would they would do nothing they would barely show up to meetings not sit on in committees and me and the executive director were like did we not go over this and it you know we couldn't afford to have people that weren't gonna participate so what do you do in those situations I mean we felt like we vetted and then having that awkward conversation of yeah you're not stepping up it just is horrible well it is hard I mean I think on the



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front end you do your best to communicate those expectations and to even almost talk people out of it I mean to even give them a sense of I mean this is the average board member puts in somewhere between four to six plus hours a month a board chair puts in eight to ten plus hours a month so um the more that you can you know communicate what's needed and that it is a responsibility and you know um and not just sort of take anybody you can get so on the front end um and then to the extent that they've already proven themselves obviously or they have a track record of leadership at another board I mean just like anything else if the more that that that the um the recruit has shown up and delivered other organizations or shown up to deliver to your organizations the better odds that they will and then you know you do your best to um individualize the way that you reach out to them and get them started I mean to the extent that you can mentor them to get them started to some success um sometimes people want to do it but they don't know how and they're shy about asking we don't have a lot of supports for our board members we might think they know how to do fundraising they're intimidated by it they think it needs to be cold calling when there's lots of different ways they can write a thank you note they can make a phone call they can they um so I think there's training there's support and then there's mentorship and then how can we get somebody you know what is some low-hanging fruit that we can do you know a board chair of working with and it shouldn't just be the boards here the extent that you have the chair plus your born development committee supporting those individual board members and um helping them get success the staff helping them get success and then at the end of the day they're going to be people that let you down um I mean the best that you can do sometimes is check in with them um it is um important to some people do have life get in the way they have seniors that they're taking care of that were unanticipated you know covered through a lot of people for a loop in terms of child care and taking care of seniors um so I think that you're the expectation um generally is that you will have you won't have everybody 100 be highly engaged a working board so you're going to have so try to prioritize the people in the right areas where you most need the board's work and then ultimately the board has to challenge itself is this sustainable or do we need to do we really need to be about hiring raising some more money and hiring um hiring a staff right great thank you great advice there has to be some place yeah thank you okay we still we do have some questions here other than mine uh first one is what are some suggestions um of places to look for board members so that yeah sure how do you go find them yeah sure well um a couple things one is um there are service clubs there are leadership organizations not all cities have those but sometimes those people are taxed already so that's the downside of them there are corporations who especially in Atlanta Anna and I don't know as much in small cities but HR and or Community people or even sea levels within corporations can sometimes be a resource to say hey we're looking for board talent and we're particularly looking for this kind of skill set and or this kind of diversity and um they will help you not



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all but some corporations do really value getting their leaders engaged certainly law firms accounting firms um most always value that because there's also business networking and professional development that takes place but you know here in Atlanta for example um I know um many of the charitable companies have somebody charged with trying to vet Community ask and so I'm doing strategic board recruiting as a support for a couple non-profits and I know who some of those people are so also like you know your Community Foundation your United ways your place is that know the network of leaders your funders your funders you know they like to not only give money they like to give advice I worked with the board once that did not have his next his next chair and I really challenged the CEO to say go to your key funders and say we need real good board leadership we're you know what ideas do you have and they were able to recruit the former chair of the Atlanta Women's Foundation I mean when you go to that level of ask the preeminent foundation in town they know who those talented board leaders are and so um you know it's there's a small circle of leaders who know leaders um sometimes you can even go to your competitive non-profits or non-profits in your space and say hey do you have anybody rolling off um you know and you know partner with um it should be the board but also sometimes the CEO networking to Talent great awesome great advice um next question how do I as a board president handle working full-time and being the board President we have a working board yeah I mean you know you one you just do your best you know you do your best to um it's sort of the um Stephen Covey you know important performance you know what's important um how do you prioritize and managing your own expectations at the end of the day you're you've been willing to say yes to being president um it could probably could help you to just set some expectations of where you can make a difference and to manage within those and partner with your CEO on that and then to see if you can have other board leaders step up sometimes the president carries undue weight and sometimes they do attend themselves because they're such a responsible committed person that other people don't even feel like their time and talent is needed so I would say evaluate the rest of your team the rest of your leadership see if you can build just like a good CEO would try to build a management team for shared responsibilities evaluate who else can step up with you and then find your focus um and try to give yourself um the permission to say these this is my primary um my primary aim as a president is to help the organization do this or that and then try to do this or that well and see how you can Marshal more Talent with challenging and encouraging and supporting others to step up with you great advice always hard to challenge juggle that um next question how do you balance having board members who have influence and not enough time versus board members who will invest in the org and be dedicated so you got people at different levels and different times sure yeah well um sometimes you can have an advisory or a trustee commit like you can have honorary chairs or trustees or advisory groups of there's different





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ways you can do advisory groups sometimes you can do it like a medical one that's a set of experts but you can also have really busy influential CEO types that you can put on Advisory Group and they can just open up a door or they can host an event and so sometimes you're going to have people at that level where you're engaging them uh you know once or twice a year and for something powerful um and if they can't really show up the meetings they can't do the basic duties of the job it's not generally recommended you put them on the board I mean it um or usually those really busy influential people can best um be on like a quarterly board you know one that's really kind of got a full staff and they can come and create a lot of Leverage and not necessarily a working board um how can they be a donor how can they be an advisor or you have to consider you know um you know does your does your is there a way that they can if we're meeting monthly they're probably not going to be able to show up to monthly meetings so you might need to think about do we really need to meet monthly or can we can we meet quarterly and they're on a finance committee and there's such a whiz-bang at that they can do a once a quarter they can fulfill you know a quarterly board meeting and a once a quarter Finance meeting and create a lot of Leverage or they can be on the fundraising team and create a lot of Leverage there what what's the way that we can leverage their contribution while finding the working board that runs the event or um is the Quasi marketing person you just really have to um think carefully about the expectations the structure that's needed and how else could we engage that person if they're really not able to show up right find a way to make it and discourage people if you just have these um big wigs on their board but they can and they ultimately want to fulfill their commitments too right absolutely great advice okay next question if uh you already have an existing strong board it could be intimidating to bring on less experienced board members typically younger but great um Talent any advice on how to mingle those together and make those new folks not feel so intimidated yeah well to do is sometimes have existing and

numb and sort of have back and forth what it what advice would you give to me as a new board member and um a lot of times the experienced board members see the good questions that the new ones have and see how they're bringing fresh new thinking in so I think one is um you do probably need to one evaluate your expectations in terms of giving and or give and make sure that um they're reasonable for younger people if you know if people are writing ten thousand dollar checks and they're just not there yet what's the way that they can be successful I think there needs to be um a way that there's mentorship and an appreciation of multiple generations and just like there is within a staff we have multiple Generations um talents you know that um and hopefully when that Young Person's being brought on board hopefully when every board members brought on board there's a sense of why they're uniquely



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being brought you know they're being brought because they have they have a fresh perspective sometimes you bring somebody on that um sometimes non-profits bring somebody on that was a former client or somebody who's a first generation student because it's serving first generation students and they really have invaluable experience personal experience to give so hopefully everybody you bring onto the board there's a kind of an affirmation of what um you know that they are going to uniquely bring in a way that they're tapped for that experience not that they're put into a box and said well you're only going to be able to speak about your first generation experience but typically that person might be um involved in giving advice to the CEO as their or they may be particularly tapped as you're looking at evolving your program and how is this how is this program really um working um at the Grand level well for our first generation students yeah you know if we're having recruitment problems how can how can we um better recruit and so that's the key is everybody who's brought on the board should be brought on for reasons if you want a young professional board because you want Youth and you want them to develop into a board that you can also have that or you can have committee members committee members that can demonstrate their um their value and their commitment um you know you can have a fundraising committee or some other committee where you get some diversity of age and or skill and they can they can you can see how they perform and they can get some sense of achievement before going straight on the board there's lots of different strategies yeah great advice um next question how can you engage board members in helping with tasks without forming the outside perception of an employer employee relationship with the volunteer we can't allow a volunteer at any level to have the perception of being able to commit the organization to a contractual relationship so you got to board you get you're asking them a lot but then trying to limit what they can do right yeah well you have to have policies and practices in place for um you know training policies and practices for media you know who is able to speak to the media practices around confidentiality of your board meetings and what you know how do you put the organization first you know the organizations should always be put first um so there's trainings and the financial policies um that you know and processes that they're aware of that that everything um that any check size any contract should have to go through this process and so you have to put those processes and policies in place and make your board members aware of that ultimately if you get kind of a rogue person you have to you know have to immediately clamp down on that and respectfully say you're getting ahead of us yeah I you know sometimes it's just like really enthusiasm like hey I really think that there's this great opportunity to pursue this partnership or something um and you know remind people that in the day the staff are the ones that have to make these things work right so our role as a board is primarily to come alongside as a partner yeah really our decision-making Authority really comes as a board on things like policies and practices you know with CEOs also getting on board with that the rest of all of what we



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do is largely partnering so a partnering can't be one way it has to be um you know you are um by nature in a non-profit one of the things that frustrates business leader sometimes especially if they come from a buttoned up um company where decisions happen quickly and especially if it's sort of like top-down structures um it's the nature of this collaborative model yeah and um so sometimes it can be frustrating to kind of entrepreneurial CEOs take charge kind of people and so that is also even part of your training it's like you know it um and in your ability to articulate what your culture is and how it works um as part of your onboarding uh is critical yeah awesome okay this will be our last question and I can't imagine that everybody doesn't have the same one because we do have a working board and are very supportive that they show up for meetings are very but not very involved in fundraising is that okay I've seen the same exact problem struggled with it myself you have that expectation so how do you leverage that in the board yeah well you know the rule of a board member is it's your time talent and your treasure yeah um but um I do think working board members a lot of times feel like they're putting in so much um I think it just comes down to what does the organization need and if the CEO or the executive director or the staff are not expecting the board members it doesn't just happen board members are not naturally um fundraisers most people aren't there's a few people out there that are sales people and business developers but um usually you might have one or two of those on a board at most and so if that's not happening from the CEO that's not an expectation then one it um it can work it can work but on the other hand if the non if you want to have that non-profit if the board wants to have that non-profit the CEO wants to have that non-profit continue to grow in advance then those resources that board members bring or what we call Gold because they're non-restricted right you know many of the dollars that flow to non-profits are what we call restricted dollars they can only be used for x or y um also if your non-profit is um whether it's you or you're just your development professional or your executive director if they're asking other people for money the expectation the best practice is that the board members are also role modeling that by saying I'm giving my time my talent and my money it doesn't have to be large but it is a best practice that there's a hundred percent giving now does that just happen overnight no it happens because we actually know that board members have to have training do we know what the elevator pitch is do we have what are board members most comfortable doing their most comfortable sharing a story inviting somebody to an event especially if it's kind of a fun event um they're not comfortable making a phone call making a cold call so what are the strategies that we can use um including like you know I'm on a board where we're doing a teachathon for um tenant kids that are underprivileged that they get to have tennis lessons and after school program and the teach-a-thon is encouraging professionals to donate lessons but as board members they encouraged us to set up an individual page and so I set up an individual page um yeah I made my own contribution I reached my friends and family sometimes people are willing to ask their



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friends and family right so using Facebook and social media um walks are popular almost everybody can figure out a way to come out and do a walk or a run I mean those can tax the organization but it doesn't just happen the non-profit has to partner with the board to say are we going to do some fundraising like where we just let's start by if we don't really have people that are um familiar with our organization we've got to start by cultivating a community of that cares about our work if you're and if you tend to be funded by public dollars organizations tend to get really lazy on philanthropic strategies yeah so um there's a great article called um philanthropy is a team sport you really have to create a culture of philanthropy and that's a system and board members can't just jump into that system without there being a system that's existing and mechanisms materials stories events um even like someone coming alongside them and role modeling and showing them how to do it and then ultimately you have to have some accountability and you have to be realistic on um what your current board is able to contribute so if you haven't set a give and or get that's an important discussion that the governance or board committee could say okay do we need money why do we need this do we agree you might have one or two board members that decide they have to roll off yeah that's not that's not a bad thing right awesome well uh thank everyone first of all for their questions and for you know showing up and Cindy I mean thank you for your time and your talent and you are a treasure so a great um information that you shared with us and I'll let you close with a few words if you'd like yeah thank you well first of all thank you it's my greatest pleasure to work with volunteers I know how challenging it can be to fit it into your life at the same time I also know how rewarding it can be so again you guys are already by showing up today and committing to this already uh above average and um going to great so I would encourage you just to not overwhelm yourself take one step and see where that might take you try to Marshal some others that want to come alongside you don't be alone in this effort to say I think we can do better um and then um and then give yourself Grace to say I think this is where I can contribute and if you feel like you need something from the organization or the board ask for it you know a good proactive employee also asks for what training and or supports they need so it goes both ways so thank you for your time thank you Brady Ware and Company for your investment in the non-profit community and sponsoring this Workshop it's been a pleasure I look forward to hearing how things go thank you Cindy thank you thank you everyone for attending and we'll see you again in the fall for our next one all right