

25 Leadership Habits of an Effective Board Member

UptURN

POINTING YOU IN THE RIGHT DIRECTION

Nonprofit Boards

Includes High
Payoff Tips for
Running a More
Productive Board



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Nonprofit Board Service Should be an Honor

As one progresses in his or her career, it's common to be asked to "serve on a nonprofit board." If you get asked, consider it an honor. Most nonprofit boards range from a few members to several dozen, depending upon their organization's level of complexity, mission popularity, financial commitments and more.

While some boards are all about "seeing" and "being seen," most provide good opportunities to use your specific skills and interest to give something back.

Especially for smaller nonprofits, who rely on your time, ideas, encouragement and donations to continue to meet their mission.



Nonprofit board service is one of the precious few avenues you can use to make a dramatic impact and leave a legacy, especially when you're fully engaged.

25 Leadership Traits of a Good Board Member

In serving on a number of boards over the years, I've discovered that some board members are dramatically more effective than others. Most of the "best" board members have a set of attitudes and skills that make them effective and helpful in moving the organization forward. If you're serving on a board or thinking about it, reflect on where you stand on each of these issues and select one or two to improve upon:

- 1. Is vitally interested in the organization and its mission.** If you're not, everyone else will see right through you. So, make sure your heart is in it. Be able to describe the mission statement at any time, in any place.
- 2. Knows about the organization's goals.** If you don't know where the organization is going, it's difficult to make meaningful contributions. Through orientations, background research, conversations with the executive director or staff members, it's easy to get up to speed quickly.
- 3. Works at seeing the big picture.** One of the biggest problems with boards is that some members get into too much detail. Plot out the direction, let the professionals figure out how to get there.
- 4. Intuitively sees the effects of action (into the future).** This helps everyone evaluate the merits of specific suggestions. What is likely to work? What is likely to not work?
- 5. Shows allegiance to the organization's mission, not the staff.** While it's important to support the staff, it's more important to make sure that the organization is moving in the right direction. The primary way to do this is to understand the mission and frequently ask, "How does what we're talking about right now fit our mission?" If the answer is, "It doesn't," then your job is to ask the tough questions and encourage others to help refocus their efforts.
- 6. Conceptualizes, shows good judgment and intellectual alertness.** You're a leader. Act like one.

- 7. Is a good player, listens to, supports and tries to encourage others.** No one likes someone who thinks they are right all of the time—even if they are.
- 8. Understands what his or her responsibilities are.** Ask questions before you agree to be on the board. Find out major issues, what you can do to help, why they are interested in you, what are the expectations of the board as a whole, etc.
- 9. Asks questions at board meetings and communicates clearly.** Make sure they know you want to be involved and be active during meetings.
- 10. Encourages and reflects.** If the board is not evaluating itself, the organization's outcome and chief executive (executive director) annually, establish and implement these three board responsibilities.
- 11. Knows the pay structure.** Be sure to know the salary ranges for the staff and the policies for setting salaries.
- 12. Honors his or her word.** Do what you say you'll do, when you say you'll do it.
- 13. Is nice.** Say things that are kind and courteous to the staff.
- 14. Has some fun from time-to-time.** Use your sense of humor. Put fun into activities like fundraising.
- 15. Doesn't try to manage the organization.** Let the professional staff do that. Your role is about guidance.
- 16. Doesn't join a board to look good.** If you are joining the board because it is a resume booster, maybe you should rethink your priorities. If you aren't in it for the right reasons it will show.
- 17. Manages time effectively.** Don't join the board if you can't attend the meetings. Don't take on too much at one time. Serving on too many boards and stretching your time won't benefit anyone.

- 18. Knows his or her role.** You are there to help the organization, but don't try to get in too deep. Don't try to get involved in personal staff issues unless it's as a member of a formal grievance committee.
- 19. Doesn't overstep his or her bounds.** Don't assume you are an expert your first year serving on the board. You won't be, and that kind of attitude is not beneficial to any board.
- 20. Defines his or her involvement.** Be sure to clearly communicate what you can and cannot offer the organization before you agree to serve on the board.
- 21. Attends meetings.** Not just press events. This indicates an interest in actually helping the organization. It's tough to give input if you can't make the meetings.
- 22. Arrives on time.** This means you take your role seriously.
- 23. Is accessible.** Provide direct contact information. Communication is important and getting a hold of you should not be a chore.
- 24. Stays objective.** Questions strategic direction, but not daily operations. Board should not be micro-managing.
- 25. Sets an example.** Donate without being asked to for nonprofit or religious boards. The board sets the example for giving.

How to Make Board Meetings More Productive

A key task of every board member is participating in meetings. Believe me, there are a few things more frustrating than an unfocused, unproductive board meeting. No agenda, in adequate preparation, starting late, ending late, not clearly defining who is going to do what by when and a host of other problems are typically the culprits.

Before the Meeting

There are things you can do before the meeting to help it work smoothly. If you are well-prepared for the meeting and so are other board members, it will be a much more productive encounter.

- **If you don't have a standard meeting agenda, create one.** Creating an agenda that is effective is one of the most important elements for a productive meeting. The agenda communicates important information, such as topics for discussion, presenter or discussion leader for each topic and time allotment for each topic. Obviously it provides an outline for the meeting. Agendas can be used as checklists to ensure that all information is covered. Here are some tips to creating a more effective agenda:
 - Send an e-mail our memo stating that there will be a meeting, the goal of the meeting and administrative details such as when and where.
 - Ask participants requesting an agenda item to contact you no less than two days before the meeting with their request and the amount of time they will need to present.
 - Once all agenda requests have been submitted to you, summarize them with the headings agenda item, presenter and time. It is your responsibility to ensure that each agenda item is directly related to your goal of the meeting.
 - Send the agenda to all the participants the day before the meeting with a reminder of the goals, location, time and duration.
 - Make sure you follow this agenda during the meeting. Overtime, it will build your credibility.
- **Make sure you are prepared.** By setting the agenda, you are getting the meeting organized. If people that are set to present are not prepared, it affects the meeting plans.

During the Meeting

You may be prepared beforehand, but during the meeting you need to be on your toes.

- **Keep your meeting on track.** You made an agenda, so use it. There is no point wasting time creating one if you are going to let your meeting get off track.
- **Spend your meeting time discussing how to get tasks completed.** Focus your time on the “what” instead of the “why.” Why is easy and should be kept brief.
- **Use visual aids if they will clarify what you’re saying.** If needed, set a meeting with individuals for further clarification of their duties, or meet on the spot before you leave.
- **Record all checkpoint dates in your daily planner or scheduling system.** By knowing the deadline for each specific step, the entire process will be successful.
- **End your meeting strong.** Finish your meeting as soon as its purpose has been achieved, but no later than the specified time. Close on a positive note and make a mention of the progress and the worthy contributions that were made.

After the Meeting

- **Evaluate the meeting.** No matter if you are running it or just attending, you should always reflect on what just happened. Thinking about it after can provide some great insight into whether it went well or not. Here are some main things to think about:
 - What went well? What could be improved?
 - Did the meeting stay on task?
 - What issues were brought up that need more attention?
- **Prepare the minutes.** If the minutes aren’t prepared during the meeting, make sure they are published quickly. Information tends to have a “half-life” or you’ll only remember about half the things you talked about a few days after the meeting.