

QUESTIONS TO ASK YOURSELF BEFORE JOINING YOUR NEXT BOARD

Observations from *The Board Cafe*

Okay, you're having a great time serving on a board, but your term limit is coming up, or you're moving to a new community, or you just need a change. If asked why you joined your current board, chances are you'd reply, "because someone asked me." As you consider joining another board, here are some questions to ask yourself:

IS THIS THE RIGHT CAUSE AND ORGANIZATION FOR ME?

Approach this decision as if you were planning to make a major donation: you would probably begin by thinking of areas where you have strong feelings—perhaps care for the elderly, or civil rights, or the environment. After settling on a subject area, you might then learn about several different organizations working in that field, and investigate ones that seem to have high impact and are well managed. Only after you were fully satisfied would you make the donation.

The next time you consider joining a board, first ask yourself whether you truly feel strongly about the type of work that the organization does and the people it serves. Since, as a board member, you'll be investing not only money but time and energy, ask yourself whether the organization seems to be a pretty good risk as an investment.

CAN I WORK WITH THIS AGENCY AND THIS BOARD AT THIS PARTICULAR STAGE IN ITS LIFE?

At one time in an organization's life, board service may be fairly smooth with a few bumps, while at another time board service may involve a hair-raising roller coaster ride (of course, an unexpected event can throw any board for a loop). What type of board seems right for you right now? You may want a board that really lets you roll up your sleeves and get to work with the other board members, or you may want a board that is stable and can let you learn about board work in a deliberate way.

WHAT CAN I, AND WHAT WILL I, CONTRIBUTE TO THIS ORGANIZATION?

What skills, contacts, and perspectives do I have that will be useful to this organization? How, specifically, will the board use what I can bring? Often as board members we find that some of our talents and contacts never seem to get utilized by the boards we're on. Perhaps you gave up a music career for accounting, or have writing skills that

are not used at your job. Perhaps your customer network includes dozens of influential community leaders. Consider first what you bring to the table, and then, whether you are willing to give that to the organization. Look, too, for vehicles for your skills: if you can't see a specific vehicle (work on an event, help market a service, work with the Treasurer), your desire to contribute may well go unfulfilled. Ask yourself:

Do I believe in this organization enough to introduce my customers to it? Can I make a commitment to attending at least 75% of the meetings? Am I willing to give up one or more evenings a month? Am I willing to make a generous donation? Can I volunteer with other board members on occasional Saturdays? Would I feel comfortable having my name on their letterhead or on their brochure? The right time to ask these questions is before, not after, you have joined the board.

This final question is one that potential candidates should ask themselves and one that active board members should periodically re-examine during their board service:

WHAT DO I WANT TO GET OUT OF BEING ON THIS BOARD?

An all-too-common experience for board members at the ends of their terms is a feeling that they didn't, after all, really get deeply involved and don't, as a result, feel that they either contributed as much or got as much as they had hoped when they first joined. Board members who plan and ask for what they want in the board will contribute more as well as gain more. For example, if you don't have a finance background but wish you knew more about finance, consider asking to be appointed to the Finance Committee. If there's a community leader on the Program Committee who you would love to get to know, ask to be on the Program Committee, and put in the time to be sure you get to know all the members well. If one of your reasons for joining the board was to meet new people, volunteer to help put on the annual luncheon or staff the table at a street fair.

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WHAT SHOULD I KNOW BEFORE JOINING THE BOARD?

This information and set of questions are from the web site of BoardSource (the organization formerly known as the National Center for Nonprofit Boards).

Questions Prospective Board Members Should Ask

Serving as a board member is one of the most challenging and rewarding of volunteer assignments. While appointment or election to a board is an honor, board members have important legal and fiduciary responsibilities that require a commitment of time, skill, and resources. Prospective board members do themselves a service and show that they are serious about the commitments they make by asking some basic questions before joining an organization's board. You can find the answers from the board member who issues the invitation to join; the chief executive of the organization; the board chairperson; other board members, current and former; or written materials. Long-time board members might also benefit from an organization review that answers these questions.

Ask questions about the organization's programs:

- What is the organization's mission?
- How do its current programs relate to the mission?
- Can I visit the organization to observe a program firsthand?
- Does the organization have a strategic plan that is reviewed and evaluated on a regular basis?

Ask questions about the organization's financial status:

- Is the financial condition of the organization sound?
- Does the board discuss and approve the annual budget?
- How often do board members receive financial reports?

Ask questions about the organization's clients or constituencies:

- Whom does the organization serve?
- Are the organization's clients or constituencies satisfied with the organization?

Ask questions about the structure of the board:

- How is the board structured?
- Are there descriptions of the responsibilities of the board as a whole and of individual board members?
- Are there descriptions of board committee functions and responsibilities?
- Who are the other board members?
- Is there a system of checks and balances to prevent conflicts of interest between board members and the organization?

- Does the organization have directors and officers liability coverage?

Ask questions about individual board members' responsibilities:

- What are the ways that you think I can contribute as a board member?
- How much of my time will be required for meetings and special events?
- How are committee assignments made?
- What orientation will I receive to the organization and to the responsibilities of board service?
- Does the organization provide opportunities for board development and education?
- What is the board's role in fund-raising?
- Will I be expected to make a specific annual financial contribution?
- What role will I play in soliciting donors?

Ask questions about the board's relationship to the staff:

- Is the board satisfied with the performance of the executive staff?
- How do board members and senior staff typically work with each other?

Evaluate Your Interest in Serving on the Board

Once you are satisfied with the information you have received, it is time to evaluate your own interest in serving on the board. Ask yourself the following questions:

- Am I committed to the mission of the organization?
- Can I contribute the time necessary to be an effective board member?
- Am I comfortable with the approach and tone of the organization's fund-raising efforts?
- Can I contribute financial support consistent with the organization's expectations of board members and with my own means and priorities?
- Can I place the organization's purposes and interests above my own professional and personal interests when making decisions as a board member?

Background Materials

Selected background information can provide a useful overview of the organization, the board's work, and the responsibilities of board members. Helpful material includes:

- the organization's annual report
- the most recent audited financial statement
- the long-range program and financial plan
- a list of current board members, titles, and all affiliations
- a description of board members' responsibilities
- a board organization chart
- a staff organization chart
- the organization's newsletter, brochure, or other publications
- newspaper or magazine articles about the organization
- a brief biography of the chief executive