

How to be a Great Board Member (Or how to help your board members become great)

by Bonney Brown

A Stanford University survey of nonprofit board members revealed that 27% of board members feel that their colleagues lack an understanding of their organization's mission and strategy and over 50% felt that their colleagues lack an understanding of their own roles and responsibilities.

Perhaps this shouldn't be surprising since people often receive little or no information on their responsibilities when they become a board member. You can become a great board member and help your entire board better serve your organization by sharing this article with your fellow board members and your organization's management team. Together you can work to ensure that everyone has the information they need to be effective.

Ideally, staff leadership is proactive about providing information to their board but sometimes management is stretched thin or may not know what information board members need. If something is not clear to you, it's probably not clear to others. Asking for more information helps everyone so when in doubt, ask!

Ten Things Every Board Member Should Know

Every board member and the organization's staff or volunteer leadership team should have access to the following information and become knowledgeable about these key elements of board governance.

1. **Mission and Goals:** Be sure that you understand the mission and goals of your organization. They should be provided in writing to board members and shared with all staff and volunteers.
2. **Governance Documents:** Each board member should receive and read the Articles of Organization and Bylaws. These two high-level governance documents provide essential information about required meetings, terms of office, and other responsibilities.
3. **Legal Responsibilities:** Each state has specific legal duties for board members. Often these include the duty of care and loyalty. The duty of care requires that board members ensure the prudent use of all assets and provide financial oversight. The duty of loyalty is the responsibility to act in the interests of the nonprofit organization, those it serves, and those donating funds. Board members are to ensure that the nonprofit's activities and transactions are advancing its mission, and they must recognize and disclose conflicts of interest.
4. **Requirements for Your Organization's Board:** A board member agreement or contract can ensure that all board members and the organization's staff leadership are clear on their commitments to each other. A written agreement helps ensure accountability for all parties and makes addressing problems easier. You can download a sample board member agreement here: [Sample Agreement](#).
5. **Key Programs and Performance Metrics:** Board members' responsibilities include monitoring the effectiveness of the organization so each board member should be familiar with the organization's programs and strategies. Key metrics for success, which can be tied to the organization's goals or key elements of your programs, enable staff and board members to see

how the organization is doing on an ongoing basis. This might include data like the number of animals served, the number of pet adoptions, or active volunteers. Monitoring key metrics can help you find solutions before a bigger problem develops.

6. **Financial Reports:** Board members are responsible for the financial and ethical well-being of the organization so it's essential that they have a solid grasp of the current financial status of the organization. Hence, board members must receive current financial reports (often monthly, but at least quarterly) and the Form 990 that is filed with the IRS each year. Many board members do not know how to read financial reports, so it is a good idea for the treasurer to review these documents with the board periodically and teach each new board member how to read them. There's also information online about which reports you need and how to read them.
7. **Fundraising Plan:** To be successful, every organization needs a development or fundraising plan. Since part of the work of the board involves helping to ensure adequate resources, this often involves board participation and support in efforts to raise funds.
8. **Key Messaging:** Part of being a board member is serving as an ambassador in the community and helping elevate public awareness of the organization's work. To be effective, board members should be provided with the organization's key messaging and communication priorities.
9. **Differences between Board and Staff Roles:** The board's role is governance; the staff's role is management. The Board sets high-level policy; the Executive Director (ED) or Chief Executive Officer (CEO) implements policy and oversees operations. That individual should be empowered to make decisions on how things get done. The Board hires and evaluates the ED or CEO who in turn hires and manages all other staff.

In smaller or younger organizations, it is not unusual for board members to also fill volunteer roles, even roles that would typically be paid staff roles. The best way to handle this is for board members to view their volunteer work as separate and apart from their role as a board member. It's helpful to keep in mind that the board of directors has authority as a body – not as individuals – and the board speaks with one voice. When a board member is in their volunteer role, they should respect all policies, defer to staff or volunteer leaders, and act as they would expect other volunteers to act. It is important to not throw your weight around because you also sit on the board.

10. **Role of the Board:** Problems occur both when board members over-step and when they are disengaged and uninformed. Here is the role of the board in a nutshell. The board:
 - Governs the organization by establishing the direction of the organization and broad, high-level policies. (This does not include deciding how everything will be done.)
 - Is responsible for its financial, ethical, and legal integrity which includes ensuring adequate financial resources by helping to fundraise, complying with laws and policies, and providing financial oversight.
 - Hires, provides support to, and monitors the performance of the ED or CEO.
 - Monitors the organization's performance and ensures effective planning for the future.
 - Builds and maintains a competent board which includes assessing their own performance and recruiting new board members.
 - Enhances the organization's public standing by engaging in appropriate advocacy & outreach.

If your board of directors or organization is facing a challenge or if this article raises questions for you, we are happy to plan a free call to discuss your situation and offer support and advice. Each organization has their own unique challenges, and we are happy to talk yours through with you. Email us any time at info@humanenetwork.org to plan a call.