Five Questions Every New Nonprofit Board Member Should Ask

by **Bill Hoffman**, on 3/17/17 8:00 AM

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Congratulations, you've just been appointed to one of the more prestigious nonprofit boards in your community! You're really excited, because you have a passion for the organization's mission and have heard nothing but great things about it. But after the warm glow cools down a little, you realize the pressure is on—how are you going to make your mark and really contribute to the organization? Start with asking the executive director or board chair these five questions and let their answers guide you to success.

1. WHAT AM I SUPPOSED TO BE DOING?

Although you would think the answer to this question is obvious, it's actually a pretty good thing to get some clarification on. Are the expectations just for you to show up at board meetings and share your wisdom? There's nothing wrong with that, but most boards ask much more of their members. Are you also expected to put in extra hours attending community meetings and fundraisers, selling tickets to fundraisers, helping with fundraising outreach, volunteering in programs, etc.? And what are the attendance expectations for those board meetings? I've seen cases where board members didn't realize the bylaws set minimum attendance requirements to remain on the board.

There may be written expectations for board members, but a conversation about what you uniquely bring to the board is equally valuable. You should also take note if the answer you got to "What am I supposed to be doing?" is nebulous or shows a lack of focus or low expectations. Be wary of low expectations; they may indicate the organization doesn't know how to engage and use volunteers effectively.

2. HOW CAN I HELP WITH YOUR FUNDRAISING WHEN I DON'T DO FUNDRAISING?

One of a board member's key responsibilities should be to help bring resources into the organization. Although some board members may be knowledgeable about and perfectly comfortable with this task, most have no background in it and are decidedly uncomfortable with it. Volunteers often think of fundraising as getting in front of someone and doing the ask for money, which can be a very difficult conversation. But there are other ways to help bring in resources, such as:

Identifying prospects. If you're a typical board member, you are well connected in the community and can identify individuals, foundations, or companies who have a passion for your organization's mission. Starting with who might support the cause is important.

Strategizing. After identifying who might be willing to support the organization, you can help determine about the best way to approach them. Fundraising usually involves multiple steps and meetings—an organization rarely goes straight to the ask. Knowing the best approach to a potential donor is crucial, and someone who knows the prospect—you—is going to be valuable in thinking through the process.

Advice visits. Everyone likes being asked what he or she thinks. You can contribute to the organization's fundraising efforts by setting up an informal meeting to ask for advice from the prospects you've identified. It may lead to direct funding or could lead to new ideas or prospects.

Thanking. Your personal thank-you call or handwritten note will go a long way in howing a donor just how much he or she is appreciated. Every board member, no matter how uncomfortable with other aspects of fundraising, can be part of the thanking team.

3. I'M NOT AN ACCOUNTANT; HOW DO I KNOW IF THE FINANCES ARE OK?

It's true that as a board member, you have a fiduciary responsibility for the organization. You and your fellow board members are the stewards of the organization's resources and must provide oversight as to how they are used to fulfill the organization's mission.

It's also true that nonprofit financials can be intimidating to someone without a financial or management background. If the organization is following best practices, your executive director will do a financial orientation and brief you on the reports you should expect.

There are other ways to increase your comfort level.

- **Make sure the board treasurer or finance committee chair has a financial background, is familiar with nonprofit bookkeeping, and is scrutinizing the monthly financials.** If the experts are comfortable, you should feel more comfortable.
- **Make sure the board sees all financial audit reports, and that the auditors report directly to the board.** Not every nonprofit has an annual audit, but if yours does, it should be performed by an independent audit firm that reports directly to the board, or at least the finance or audit committee. Even you are not directly involved in the audit process, you should review the report and make sure you don't have questions.
- **Make sure the board sees and approves the organization's Form 990 each year before it's filed with the IRS.** In addition to providing a chance to review the finances reported on the form, this step allows board members to see how the organization is being positioned to the public, as the 990 is widely distributed and read.

4. HOW CAN I BE AN AMBASSADOR FOR THE ORGANIZATION IF I'M NOT A PUBLIC SPEAKER?

Some of the most effective venues for sharing your passion for the organization, its mission, and its programs are the informal opportunities you have interacting in the community. These interactions don't take any public speaking skill, but they send a powerful message. Make sure staff has helped you develop a two-minute elevator speech so you hit on the highlights and are comfortable that you're giving the right information. Then watch as eyes light up when you share your passion for the organization.

Because you are an unpaid volunteer, you have a huge impact when you share how you feel about the organization. People know that you are laying your reputation on the line, and that you're not being paid to tout the organization. You volunteer status increases the effect your words have on your listeners. It's as if you're using a megaphone to share your passion.

5. ARE THERE PERSONAL FINANCIAL EXPECTATIONS OF ME?

Although this question should have been clarified before you joined the board, it's surprising how often it is not directly addressed. Many nonprofits require personal donations from board members, sometimes with a minimum amount. It makes sense that if a prospect is going to donate to the nonprofit, the volunteers closest to it have invested in the organization first. In fact, this is often a question on grant applications—that box of "100% board giving" must be checked before the grant application will be considered.

A board will often recruit high-level representation from a major employer. There should be a policy on whether the corporate gift from that organization fulfills that board member's personal requirement, or if the individual must give. The same should be clear for heads of foundations.

There are certainly many other questions a new board member should have answered to feel comfortable that he or she can make a significant impact for the nonprofit, but these are five questions to start with. Hopefully they are the beginning of deeper conversations that fast track the new board member into full engagement and a highly successful tenure on the board.

The preceding is a guest post by Bill Hoffman of Bill Hoffman & Associates, LLC, a Tampa-based consulting firm with national-level independent sector expertise in educational engagement strategies, on profit leadership transitions, and organizational and board development. Bill has senior-level nonprofit management experience in education, having been the president of one of the nation's top K-12 education foundations; functioned as interim CEO for prominent national and state education and philanthropic associations; and led national, regional and state boards of directors. He is also an adjunct professor at National University, teaching Non-profit Leadership and Board Development.