

CHARTING THE RIGHT COURSE: TIPS FOR THE NEW BOARD CHAIR

By JUDY LEVINE

All eyes are on you as the new board chair. How best to get started?

Here are some essential steps you can take to lay the groundwork for successfully leading the board team and supporting the executive director.



Develop a team that

hums: Taking the reins can provide a fresh opportunity to organize the effectiveness of the board. Your job will be easier if you place the right people on key committees, for example chairing fundraising, finance and governance. Perhaps you've inherited some long-standing committee chairs who've grown complacent. Meet with board members individually to hear who is disengaged and who might rise to take on a new challenge if inspired. Ask people to step up to join your leadership team. Don't wait for them to come forward; it is rare for someone to seek out more responsibility.

Your goal? To place people where they can be the most productive, to communicate your expectations and to develop a second level of board leadership so you're not doing all the heavy lifting on your own. Pay particular attention to the position of governance committee chair. That person should be your partner in grooming other leaders and adding new members to the team.

Manage the board's evolution: Are you changing expectations for board service? If so, then be prepared to transition some members off of the board to other forms

of volunteer service if they feel unprepared to agree to the new expectations, particularly in regard to attendance and fundraising.

A change in board leadership is an ideal time to remove low performers from the board without their losing face. After the board has agreed to hold itself accountable to new standards, a face-to-face conversation to "counsel off" those not ready to rise to new expectations is essential to easing these transitions without damaging relationships.

Partner with the executive director: Maintain a regular meeting schedule with the executive director. Combine in-person and phone formats and set a standing agenda that encourages the executive director to anticipate what information you, as board leader, need to know and advise on – but not to "overshare" minutiae.

Make these conversations safe and supportive. If the executive director is worried about your reaction to bad news, it's human nature to withhold. Create an environment to candidly talk as partners and tackle small issues together before they develop into big organizational problems.

Focus on the long term: As board chair, keep your eyes – and the board's – focused on the horizon while you monitor current trends. Balance managing immediate issues and the important-but-not-urgent factors that will drive your organization's future. What changes might be looming that will affect the mission and programs? Where are the avenues to sustainable revenue? The executive director has the pressing assignment of steering the ship in the present. You and the board can assist by

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asking about and planning for the longer term.

Board meetings should be a place for big-picture deliberation. Steer the agenda away from a simple recitation of reports (which should be circulated and read ahead of time). Use meetings for board members to discuss strategy, make decisions and plan next steps. A lively give-and-take gives board members a reason to attend meetings. Start and end meetings on time out of respect for fellow board members' commitment to the cause.

Be the head cheerleader: Be positive. Even as you help the staff navigate difficult problems, you must be upbeat and confident. Your voice sets the tone for the board, the staff and the public. Tell staff and fellow board members that you see and appreciate their hard work. This is particularly true for the executive director, who has no day-to-day boss to acknowledge their work. Create a culture of appreciation and "thank you."

Motivate board members. Remind them why they're present and keep them enthused. This is one of the key responsibilities of a board chair. The payback for these volunteers is their impact on mission, and the joy of being part of a productive, collegial team.

Model the behaviors you seek: Be a role model. Take on assignments, and make yourself avail-

able to serve as the board's public ambassador whenever needed.

Show the board what an engaged board member looks like: Prepare in advance for meetings, listen fully, think strategically and focus on policy, not operations. Demonstrate the values of personal responsibility and accountability.

You must lead the charge on fundraising as well. While you don't have to be the largest contributor on the board, you do need to give a personally significant gift and regularly champion the "getting" end of the board's give/get equation.

Have fun: Enjoy yourself and the company of your talented colleagues! You're steering a great ship in partnership with accomplished board and staff teams. Serving as a board chair is a critical way to have a positive impact on the world, enriching your professional and personal life. Your leadership will help your organization make a real difference. •

Judy Levine is executive director of Cause Effective, a nonprofit that counsels board leaders and staff on effective stewardship and fundraising. Cause Effective advises over 100 nonprofits a year on every type of governance and fundraising challenge, helping nonprofits build a sustainable community of supporters. Visit www.causeeffective.org for board chair tip sheets and other governance resources and to find out about Cause Effective's Chairing For Success Coaching Program.

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