

WEBINAR

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# From Passive to Powerful Nonprofit Board Engagement Strategies




# Meet Your Presenters

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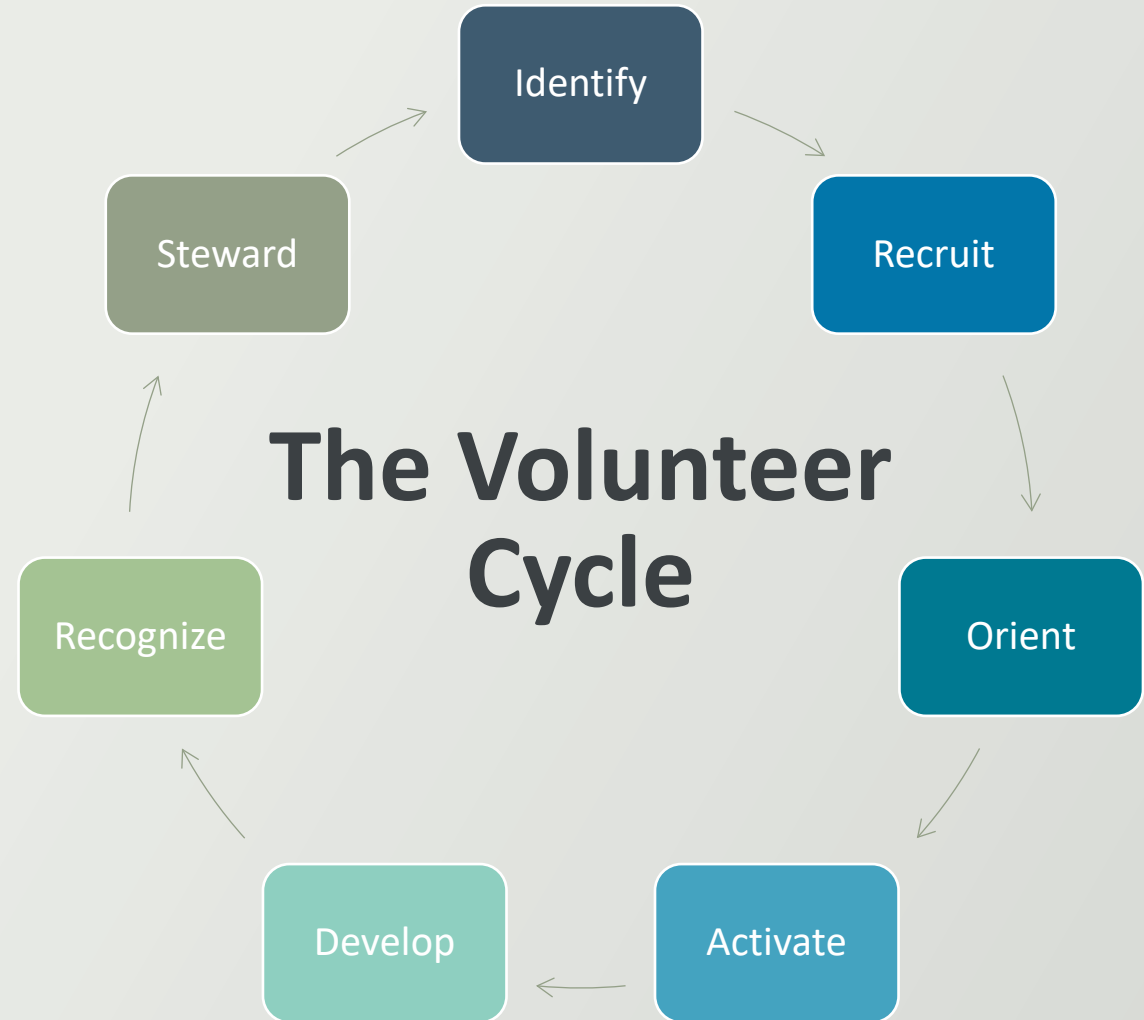


**Mandy Helton, CFRE**  
Consultant  
Soukup Strategic Solutions



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Consultant  
Soukup Strategic Solutions

# What are some of your challenges in engaging your Board?



# Recruitment

## Your recruitment process is part of the Board member's story

### Be Intentional

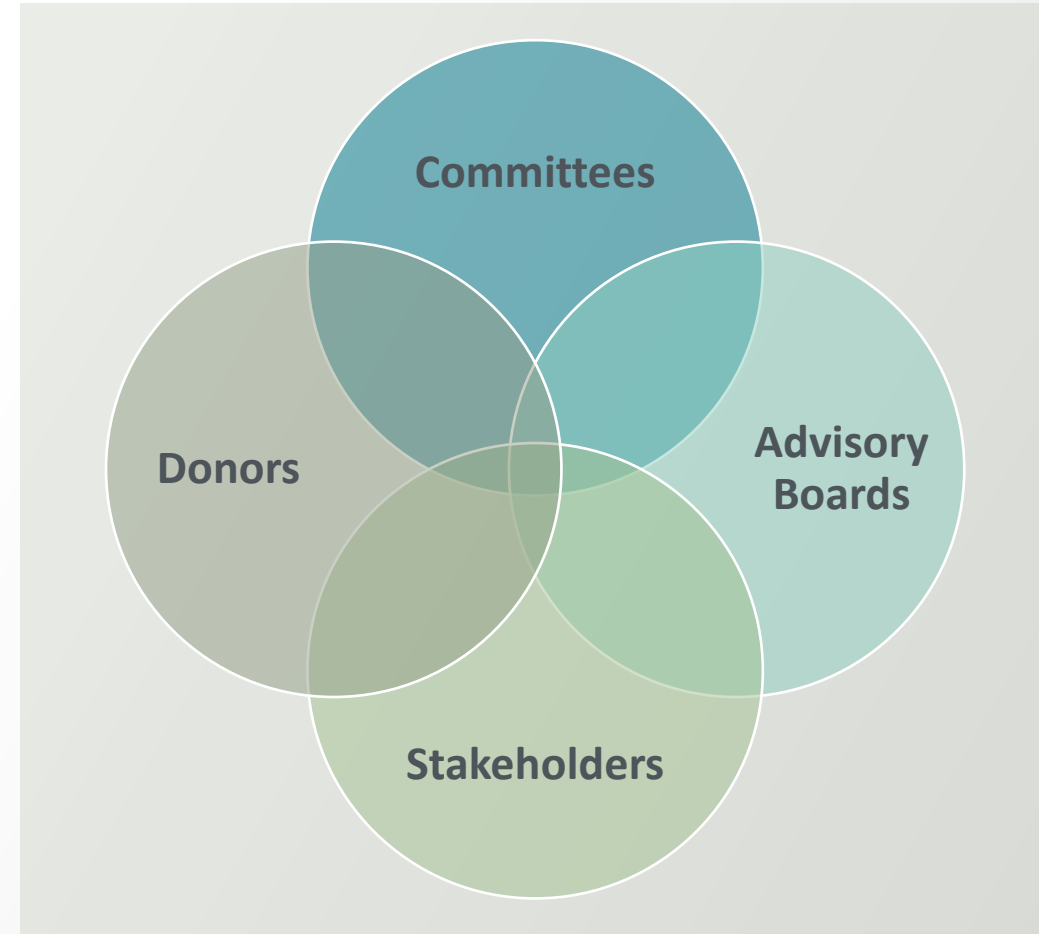
- Needs to be led by a governance committee or executive leadership
- Have your current board members be thinking about their replacement when their role is over
- Have a strategic process by which you identify skills, gaps, and needs for leadership roles

ABC Company	Current Board Members				Anticipated Board Members				
<b>Sex</b>									
Male	X			X	X	X		X	X
Female		X	X			X	X		
<b>Age</b>									
20-35		X				X			
36-55	X			X	X			X	
56+			X		X			X	X
<b>Race</b>									
Caucasian	X		X		X		X		
African American								X	
Latino									
Asian		X				X			
Other				X					X
<b>Skills</b>									
Financial Acumen	X				X				
Industry Knowledge	X				X				
Regulatory Expertise				X				X	
Technical Knowledge	X				X				
Marketing Skills		X				X			
Research & Development				X					X
Auditing Experience	X			X	X			X	
Public Relations		X				X			
Personnel		X				X			
Legal Expertise			X					X	

# Recruitment

## Build a Pipeline

- Use internal committees, advisory Boards, community stakeholders or donor lists to qualify individuals for Board service
- Review consistently



# Orientation

**Led by** other board and staff leadership

**Be strategic** about how, when and what you introduce to your new board members.

**Clear explanation** of fiduciary responsibilities and expectations:

- Understanding their role of governance vs operations
- Including building a culture of philanthropy
- Get them involved in creatively thinking about fundraising



# Connection

Involves genuine understanding, empathy, and mutual support

- ✔ Cultivate Board inter-relationships
- ✔ Shared service opportunities and social gatherings
- ✔ Recognize birthdays happening on a meeting day, promotions, etc.
- ✔ Be sensitive to family/life changes



**What are some things  
you can think of that  
you can connect your  
Board members closer  
to your mission?**





# Meaningful Communication

## Regular Communications

- Material Review Before Meetings
- Timely follow-ups
- Board Chair Check-Ins on a consistent basis

## Emergent Communications

- Board members should hear FIRST whenever possible.

“The more we learn about effective communication, **the better we’ll be at leading**, as our directives will be better understood.”

- Paul Jarvis



# Meetings That Matter

## Begin and Center the Meeting

### Incorporate a mission moment into each meeting

- New voices
- Consultants
- Program directors
- Showcase Work Product, etc.



## Avoid Meetings That Are Solely Reporting

1.

Facilitate Dialogue

2.

Small Group Brainstorming

3.

Ideation/Visioning Sessions

4.

Multi-Sensory Experiences

**What are some things that have worked to make your meetings more engaging and effective?**



# Meetings That Matter

## Who Is Active and Who Needs Activating?

- Where Can Each Board Member Participate?
- Invitations to Participate

*We're getting ready to discuss a marketing issue, so [person's name], I hope you will weigh in here.*

## Meeting End = Time to Activate

- Recap the work between now and next meeting
- **GOAL:** Every Board member should leave feeling that they have achievable work to contribute before the next meeting.

## Thank, Thank and Thank Again

Recognize Board members for their contribution

Board Meetings



Print or Digital



At Public Events



# Board Development

- Have a designated Board member (chair or otherwise) who checks in with Board members:
  - Individual goals as a Board member
  - Aspirations for leadership or greater involvement
  - Conducts any exit interviews
- Designate work to Sub-committees as appropriate
- Always be recruiting



# Keeping Former Board Members Engaged



## Ongoing Appreciation & Relationship Building

- **Personal Check-ins:** Leadership reaches out annually to maintain the relationship.
- **Annual Gathering:** Host an event or virtual meetup for former Board members.
- **Special Invitations:** Include them in major donor events or strategic planning.



## Database & Communication Strategy

- **Tag in Database:** Mark as “Former Board Member” for targeted outreach and recognition.
- **Exclusive Updates:** Send periodic emails with key updates and opportunities.



## Involvement in Fundraising & Volunteering

- **Advisory Roles:** Offer opportunities to serve on committees or as informal advisors.
- **Peer-to-Peer Fundraising:** Engage them in campaigns leveraging their networks.

# Final Thoughts

- ✓ **Recruitment:** Make sure you have the right people in the first place.
- ✓ **Connection:** Make sure that Board members feel connected to the work.
- ✓ **Communication:** Make sure that you are informing and speaking to your board members on a regular basis.



# Questions

## Share Your Feedback About Today's Webinar

We'd love to hear your thoughts, please give your feedback in this quick survey, [www.surveymonkey.com/r/9FK2ZJL](http://www.surveymonkey.com/r/9FK2ZJL).





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