

# Building a Better Board

## Numbers

Have enough people on your board so that all the jobs are getting done and no one person is shouldering too big a load.

- President
- Vice President
- Treasurer
- Recording Secretary
- Membership coordinator – receives phone calls and mail, send out materials
- Someone to update and maintain the membership database
- Someone to compile the newsletter

If you have seven board members to do the above jobs, these others can be done by committees formed from the seven. Other jobs include:

- Publicity/public speaking
- Funeral home price survey
- Planning annual meeting
- Fundraising
- Funeral board/Legislative monitor
- Distribution of pamphlets (good job if you have someone on your board who is not doing much but doesn't want to leave the board. Or, use volunteers from your membership).

## Overall Qualities

Raise your standards and you'll raise the quality of your board. Some affiliate board members feel so desperate that they will take any warm body that offers to be on the board. If you treat it like a task no one would want, you're not going to attract the kind of people that are going to make an effective board. Shake off the desperation and show new recruits your enthusiasm. Your board deserves highly skilled and participative board members. Remind yourself of FCA's mission of activism and your local's potential and move forward with the idea that it's an honor to be invited to serve on your board.

You can't find the right people if you don't know what you're looking for. While you need the roles filled, look for overall qualities that will help your board work well. You may need someone to be your treasurer, but if you find someone who has that skill but is irritating to be around, not a good choice.

Don't be scared someone will say no. You might get turned down a lot, but aim high. No one is going to be insulted by being asked.

If you truly think your board is crummy and you're embarrassed to ask anyone you respect to join, you can say *"I even feel guilty asking someone like you to join a board that's as weak and confused as this one. But this organization has a unique role to play as no one else is working to protect funeral consumer's rights. What's really needed is a total overhaul of the board. I'd like you to work with me and two others of the same mind to work with the new director to recruit six new members and really make this board work. Would you work with me on that committee?"*

Look for people who:

- Have the ability to: listen, analyze, think clearly and creatively, work well with people.

- Are willing to: review agenda and supporting materials prior to board meetings; attend board meetings, serve on committees and offer to take on special assignments, ask questions, take responsibility and follow through on assignments, contribute personal and financial resources in a generous way according to circumstances, inform others about the organization.
- Will develop certain skills, such as to: solicit funds, identify and recruit board members, read and understand financial statements, learn about and stay up to date on funeral issues.
- Possess: honesty, tolerance of differing views, a friendly, responsive, and patient approach, community-building skills, concern for your mission, and a sense of humor.
- Are well known and respected community members on your board. They have good connections, are effective at spreading the word about what you do, and they will lend credibility. But, make sure they are willing to do a job as well, even if it's only a small one. Be clear with new recruits that you have a working board; there are no figurehead positions.

Even if you are thoroughly revamping your board, keep one or two long term board members if you can. While some founding members can be being rigid and controlling, others are invaluable for their institutional knowledge and expertise.

### **Specific Skills**

It's important that each and every person on your board fulfills a role. Look for board members who will complement your current board, not replicate the strengths you already have. Do you have:

- A good writer
- A good public speaker
- Someone familiar with publicity
- A couple of people with a solid financial background
- Someone with fundraising experience and/or the ability to tap into higher-dollar donors
- An attorney (especially helpful are those familiar with end-of life issues or estate planning. Also nice to have for helping with 501(c)(3) status, charities registration, etc.)
- A hospice social worker, nurse or chaplain (everyone on hospice will be planning and purchasing a funeral)
- A physician (especially helpful; a gerontologist, hospice or palliative care physician or one who sits on the local hospital's ethics committee)
- A reporter (could be your good writer and be helpful with publicity)
- A professor who teaches Death & Dying, Ethics, Marketing, etc.

### **How to Find Them**

- Form a recruiting task force: Sit with your board and make a list of 20 well-connected people of the type you would love to have on your board but who you figure wouldn't do it (but who might know someone who would). Call them and invite them to come to a single meeting. Tell them that you will be telling them about FCA, your mission, services and potential, what you're looking for in board members and that at the end they'll be asked simply for the name of one person they think would be a good board member. At the meeting, prepare a short presentation of what FCA does and end with the funniest and/or most touching story you can come up with (ask FCA for one if you don't have one) that will convey your enthusiasm. If you're lucky, one of them might actually end up agreeing to be on the board (we are very unique). At minimum, you will walk away with the names of a bunch of potential board members. The next day call each one and start by telling them who nominated them.

- Ask each of your current board members to bring the names of three potential board members to your next board meeting. At a minimum, the referring board member needs to be able to articulate why they think the person is a good match. Invite the candidates to a board meeting or have a couple of board members meet privately with them.
- Swinging board members. Pick a few local non-profit organizations, preferably of a similar size (hospice, senior center, community hospital, counseling center, YM/WCA, medical condition related, or even theater, music or other arts group, or environmental group). Call and invite a leader to chat with a couple of your board members and suggest that your two organizations recommend "retiring" board members to each other as a way of establishing organizational links and strengthening ties among communities.
- Make friends with your local hospice. A social worker is an especially good match because of her focus on social justice issues. A hospice physician, nurse or chaplain is also a great choice.
- See if there are home funeral consultants in your area. We share many values and interests.
- Contact a friend or colleague who's affiliated with a local university and see if they can identify professors of public health, management, death and dying, or an administrative dean.
- Consider your membership. Are there people who've written thank you notes or stuffed envelopes that might help in other ways? Have you gotten calls from people who shared their own passionate stories of being wronged or those who've been appreciative of your help?
- Make an appointment with the head of a local corporate foundation or corporate giving department. Explain your organization's work and the kind of board members you are seeking. It's likely that the executive staff of the corporation are already on boards and might like to see their junior members join boards for community goodwill and leadership development.
- Ask your co-workers, friends and family for suggestions.
- Use the online forum at [www.funerals.org](http://www.funerals.org) or the listserv to ask other affiliates where they found their good board members
- See if your community has a board recruitment program through the United Way, a volunteer center, or a technical assistance organization.

Cattle Calls are less effective because they don't make a link between the need and what the individual can offer. Don't get too excited about a candidate who responds to these as willing bodies do not always make good board members. Serious cultivation and information sharing before inviting this person to serve on your board will produce better results. But, if you must...

- Place ads on bulletin boards, in your newsletter, in the neighborhood newspaper, in the alumni newsletter of a local college, etc. Example: "HELP FCA YOUR TOWN... We're looking for a few talented and conscientious volunteer board members to lead and strengthen our work protecting grieving families from funeral fraud and overspending. If you can contribute your time, thoughtfulness, and leadership one evening a month and are interested in exploring this opportunity, please contact us to find out whether this volunteer opportunity is right for you.
- Post "Great Board Member Wanted" ads on your local community website and on those that match people seeking boards with nonprofits seeking board members such as [www.boardnetusa.org](http://www.boardnetusa.org) or [www.volunteermatch.org](http://www.volunteermatch.org)

## **How to ask**

Most people who have served on a nonprofit board know what they are doing and why they want to do it. However, you may have your eye on someone with no board experience. This is what you want to impart:

- Your skills are needed.
- Our affiliate is going to improve and will benefit from your contributions.
- You have the potential to effect change and have an impact.
- You will feel good by doing good.
- You will enjoy collaborating with interesting people who have the same values.
- You want to learn new skills.
- You enjoy being recognized for your efforts.
- You want to give back to the community.
- It is fun!

### **Prepare to be on the lookout for board members on a continuing basis**

You cannot expect to find the best people if you are rushing to find people before the annual meeting.

### **Have an application**

Include basic contact info plus special skills or expertise (fundraising, finances, PR, databases, legal, newsletters), professional background, education, other professional affiliations, other board service, special interests or hobbies.

### **Interview prospects**

Most know little about your affiliate or the work you do. Meeting with one or two board members is good enough for most.

- Why are you interested in our organization?
- Why are you interested in serving on a board?
- Do you have any previous board service, leadership, or volunteer experience? Are you presently serving on any boards?
- What kinds of skills or expertise can you offer? How will the organization benefit from your participation? How do you think we could best take advantage of your expertise?
- What do you expect us to do for you so that your experience is satisfying?
- What kind of time and financial commitment will you be able to make? Are you willing to serve on committees and task forces? Can we expect you to come to board meetings regularly? Would you be able to make a personal contribution?

### **Consider a contract**

It doesn't have to be scary, but they are taking on formal responsibility for governing this non-profit. It makes it clear you are asking for a serious commitment and you can use it if you need to chop off some deadwood down the line. It can be as general as *"I understand that there will be a 2-hour board meeting once a month, committee meetings once a quarter, that I will be asked to participate in planning and attending the annual meeting, etc..."*

### **Disclosure of conflict of interest**

While people in the funeral industry cannot serve in a voting capacity, there are others who might have areas of conflict. All board members need to sign this form. FCA can give you one.

## **Orient new members**

Give them enough knowledge about the organization and their role that they can get to work. Ask existing board members what they wished they'd known and what would've helped them get up and running faster. Give them:

- The mission, vision and values of the organization
- Some of the organization's history
- A copy of bylaws
- The current budget
- The roles and responsibilities of the board and staff (if any)
- An administrative calendar that shows ongoing major activities of the board
- A list of current and planned committees
- How the board conducts meetings (Robert's rules of order, Sturgis, etc.)

## **Put Them to Work**

Involve new members as soon as possible in relevant current or new committees. Make room for new ideas and approaches. New recruits who hear "we've always done it this way" will give up, leaving you back where you started.

## **Fundraising**

Everyone should make a personally generous gift and raise funds ambitiously. All boards need to have a policy requiring board members to donate to the organization to the best of their means. We can't we ask others to give generously when we haven't done so ourselves. The board needs to demonstrate that they believe the organization is worth investing in. With a giving policy in place, prospective board members will know what is expected of them before they join, and before a donor puts them on the spot by asking, "Has all your board given to the organization?"

## **Ongoing Support and Recognition**

Even though you're a volunteer too and you put in a gazillion hours – don't forget to thank your board members from time to time.

## **Training and Development**

Continue the training of new board members and keep older ones engaged by occasionally having a guest speaker, a presentation by one of the board members, inviting board members to area seminars and conferences held by other organizations, etc.