

**ADVANCING YOUR CAREER  
THROUGH BOARD SERVICE  
WORKBOOK**

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## SOURCES

I stand on the shoulders of giants. Here are those I have quoted or whose work I've drawn from:

- “Hildy Gottlieb calls it creating the future”: <http://hildygottlieb.com/about/>
- “As Karl Moore writes in *Forbes*”: Karl Moore and Richard Pound, “Volunteering—A Great Way To Learn Real Executive Leadership.” *Forbes* (December 12, 2011).
- “A Teach for America alumnus”: Quoted in Tom Rath and Barry Conchie, *Strengths-Based Leadership: Great Leaders, Teams, and Why People Follow* (Gallup Press, 2009).
- “They’re also rated more effective in national surveys”: *BoardSource Nonprofit Governance Index 2010* (BoardSource, 2010).
- “Nonprofit organizations go through five life stages”: Judith Sharken Simon, *5 Life Stages of Nonprofit Organizations* (Wilder Foundation, 2001).
- “While there may be a gray ceiling”: Rosetta Thurman, “From Entry Level to Leadership: How to Join a Nonprofit Board of Directors.” <http://www.rosettathurman.com/2009/04/from-entry-level-to-leadership-how-to-join-a-nonprofit-board-of-directors/>

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# INTRODUCTION

## CHANGING THE WORLD THROUGH BOARD SERVICE

You can lead the way toward a changed world as a nonprofit organization board member. It's hard to find more fulfilling work, and boards need your energy, perspective, leadership strengths, and skills. This workbook gives you a high-level introduction to board service, helps you identify the right board for you, and helps you plan to advance your career through developing leadership skills that apply in your board service and your day job.

Following are brief descriptions of the workbook sections to come:

### It's About the Mission

If you are not rabidly passionate about the mission, don't join that organization's board—you'll be occupying a spot a truly passionate person could fill, to great effect.

### Mission Worksheet

I want you to learn not just the basics from this workbook, but to walk away with a plan for finding a board to serve. After you complete these worksheets, you'll be well-positioned to choose the board you can give your best in terms of commitment to its mission, your leadership strengths, and fit with one of the 10 privileges of nonprofit leadership.

This first worksheet asks you to list:

- Five things you'd like to change about the world

“ The greater danger for most of us lies not in setting our aim too high and falling short; but in setting our aim too low, and achieving our mark.

*Michelangelo*

- Five actions you think best suited to make those changes
- Five nonprofit organizations making those changes the way you think best.

### It's About You

What? You just said it's about the mission! True—but it's also about you developing your leadership skills in fulfilling the mission. That's a perfectly legitimate way to advance your career through board service. Here's what's not legitimate: Taking a board seat for the résumé line.

### It's About You Worksheet

This worksheet challenges you to be intentional about your leadership development. What leadership strengths do you need to develop for your day job? What strengths would you need to develop for board service? How can specific board roles and tasks help you fill gaps in your résumé?

### What to Expect

This section presents national statistics on time commitment and board diversity. One thing's clear: Boards really need younger members.

“ Serving as a board member is one of the most challenging and rewarding of volunteer assignments.

*BoardSource*

## Ten Privileges

As a board member you get to do 10 things on the way to changing the world! That's a blessing, not a burden. In this section I make a brief and bulletproof (!) argument for this positive view of your privileges. Bonus: I distill the list of 10 down to a much more memorable three.

## Ten Privileges Worksheet

Here you have a chance to identify in advance which privileges of board service excite you the most and the least, so you can make better decisions when offered committee service opportunities. You can also decide in advance how much time you would like to commit to board service.

## Finding the Right Board

Here are four questions to ask yourself, along with qualities to look for: organized recruitment and board size. Tip: Proceed with your eyes wide open.

## The Right Board Worksheet

This is a checklist of questions to ask when you're at the interview stage with a board you'd like to join.

Board service is a great honor and privilege. You get to lead the way toward changing the world. Here's to your success!



John M. Fulwider, Ph.D.  
Lincoln, Neb.

“

While there may be a gray ceiling in your organization, on boards, there are plenty of leadership positions available—you can lead one of the committees or serve as an officer.

*Rosetta Thurman*

# IT'S ABOUT THE MISSION

## WHAT MAKES IT ALL WORTHWHILE

How will the world be different tomorrow as a result of what we do here today? That's the question boards should ask whenever they apply time, talent or treasure to changing the world.

Do you grasp that? As a board member, you get to be part of your organization's mission impact: a world changed for the better. In fact, you get to be **responsible** for this mission impact—you get to **lead** it. Working for a changed world isn't fluff or Pollyanna-like optimism; rather, it's the highest calling and the only outcome we'll accept.

### Mission impact defined

Rock star philanthropist Bono hopes to “tear a little corner off of the darkness.” Social sector advocate and consultant extraordinaire Hildy Gottlieb calls it creating the future: “a world that functions from humanity's highest potential—a world that is healthy, vibrant, compassionate, resilient and at peace.” I call it making the world a better place for my family and friends.



Imagine what would have happened if 50 years ago, someone had said, ‘We're going to send a man to the moon and back. And we're going to do that in less than 10 years.’ Oh yeah. We did say that. And it happened.

*Hildy Gottlieb, co-founder  
Creating the Future*

Friends, we are in it to win it—to improve the world in measurable and sustainable ways. And when we can prove to others we've moved the world in the direction our mission called for, and that the world's going to keep moving that direction, that's mission impact.

### Connect with the mission or don't serve

There are lots of good organizations. Choose to lead only the one or two you're passionate about. The mission deserves no less.

### Changing Lincoln and Nebraska



Successful homeowners, quality homes, safe neighborhoods.



Making Lincoln a great place for young professionals to succeed.



Local community programming, news and music on the radio.



Helping parents of all means succeed at breastfeeding.



Helping Iraq and Afghanistan war veterans with brain injuries.



A safe, child-friendly environment for abuse investigations.

# MISSION WORKSHEET

## IT'S ABOUT THE MISSION

1. What five things do you want to change about the world?

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2. What five actions would best make those things happen?

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3. What are five nonprofit organizations changing the world the way you want, in the way you think best?

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# IT'S ABOUT YOU

## DEVELOPING YOUR LEADERSHIP STRENGTHS

Make no mistake, directing a nonprofit organization is a leadership role with great purpose. That great purpose is the mission. A Teach for America alumnus had it right: “To simply be the best new teacher isn’t enough. Winning for the sake of students is the only option.”

That said, we need strong leadership when we’re in it to win it—the mission impact we envision for ourselves, our families, and our friends. It is perfectly acceptable for professionals to develop leadership strengths while leading nonprofit organizations—and then employ those same strengths to achieve success in their day jobs.

As Karl Moore writes in *Forbes*, “The management environment in volunteer organizations is often extremely challenging. Without the compensation and organizational authority to keep their teams productive and working toward shared goals, volunteer managers must be adept leaders and persuaders as they **tackle all the same management issues they face in their corporations**: setting objectives, developing strategies, raising and allocating funds, motivating and guiding people, and complying with regulatory structures.”

The solution to these leadership challenges is developing the leadership strengths Tom Rath and Barry Conchie describe in their book *Strengths-Based Leadership: Great Leaders, Teams, and Why People Follow*. You’ll do the organization you help lead a great favor when you develop your strengths to make a uniquely valuable contribution as part of a strong board leadership team.

When you develop your leadership strengths in the nonprofit sector, Karl Moore writes, you gain these benefits for your career: Preparing for a senior executive position; gaining experience and

### Lead from Your Strengths

#### Executing

These leaders know how to make things happen. When you need someone to implement a solution, these leaders will work tirelessly to get it done. Leaders who execute well have the ability to “catch” an idea and make it a reality.

#### Influencing

These leaders help their board leadership team reach a much broader audience. They are always selling the team’s ideas inside and outside the organization. When you need someone to take charge, speak up, and make sure your group is heard, these are your leaders.

#### Relationship Building

These leaders are the essential glue that holds a board leadership team together. Without these strengths on a team, in many cases, the group is simply a composite of individuals. In contrast, these leaders create groups and organizations that are much greater than the sum of their parts.

#### Strategic Thinking

These leaders keep us all focused on what could be. They are constantly absorbing and analyzing information and helping the board leadership team make better decisions. They continually stretch our thinking for the future.

Source: Adapted from Tom Rath and Barry Conchie, *Strengths-Based Leadership: Great Leaders, Teams, and Why People Follow* (Gallup Press, 2009).

networking opportunities; practicing “permission leadership”—leading by earning the trust and respect of your direct reports; and learning to reconcile “the various, and often conflicting, demands of a multitude of stakeholders.”

### Don’t join just to pad your résumé

Doing so cheats the mission and robs you, your family and your friends of the better world you could be creating.

# IT'S ABOUT YOU WORKSHEET

1. Which leadership strength do you use most in your day job? **Circle one.**

Executing

Influencing

Relationship Building

Strategic Thinking

2. How do you use that strength?

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3. Which leadership strength would you like to further develop in your board service? **Circle one.**

Executing

Influencing

Relationship Building

Strategic Thinking

4. How will you develop that strength through board service?

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5. Here are 12 tasks board members can be called upon to do. Think about gaps in your résumé, or interesting work you've always wanted to try. **Circle three tasks** that, if you did them to advance the organization's mission, would also help fill gaps in your résumé and advance your career.

Revise the organization's mission statement.

Plan for the CEO's succession.

Benchmark the CEO's compensation against comparable organizations.

Revamp board agendas to focus on strategic thinking.

Design a dashboard to monitor program performance.

Plan a for-profit subsidiary to diversify the organization's revenue.

Train new board members in financial literacy.

Recruit and interview prospective new board members.

Revise the organization's bylaws and articles of incorporation.

Give interviews to the media about the organization.

Lead effective and efficient meetings.

Cultivate new partners in the community.



# WHAT TO EXPECT

## CHANGING THE WORLD IS A FAIR AMOUNT OF WORK

### Average Meeting Length by Number of Meetings Per Year

	1-3 times (10% of boards)	4-6 times (44% of boards)	7-12 times (44% of boards)	> 12 times (2% of boards)
Less than 2 hours	11%	38%	62%	48%
2-5 hours	21%	48%	37%	52%
1 day	31%	9%	< 1%	0%
2 or more days	37%	5%	< 1%	0%

### Time Commitment Bottom Line

“ For a mid-sized, average board, it’s not unrealistic that you could expect people to be committing 75 to 100 hours per year.

*Linda Crompton  
President/CEO, BoardSource*

### Average Board Size

**16**

## BOARDS COULD USE AGE DIVERSITY AND MORE

### Board Diversity by Organization Budget Size

	Small (<\$1 Million)	Medium (\$1-9 Million)	Large (\$10+ Million)
< 40 Years Old	18%	14%	9%
40-64 Years Old	68%	73%	70%
65+ Years Old	14%	13%	21%
Male	49%	55%	63%
Female	51%	45%	37%
People of Color	17%	18%	18%

### Board Members Under 30

**2%**

### Board Members 30-39

**12%**

Source: All figures from *BoardSource Nonprofit Governance Index 2012* (BoardSource, 2012).

# TEN PRIVILEGES

## “HAVE TO DO” VS. “GET TO DO”

Nonprofit board members have 10 responsibilities, which I want to recast in your mind as privileges. They are best framed in your mind as things you both **have to do** and things you **get to do** on the way to big and lasting mission impact. You have to do these things to maintain the public’s trust, but the reward for the public’s trust is getting to do these things that change the world.

In the box at right I’m presenting them the way Vernetta Walker, senior consultant at BoardSource, does in training webinars. As Walker says, “We know it’s not really realistic to expect board members will walk around memorizing 10 basic responsibilities.”

Great news: You only need memorize the following three, and then hang on to this workbook for later reference.

1. **Provide strategic leadership:** This is an easy one. Rephrased, it would be, “It’s all about the mission. My job is to lead everyone forward from the mission as often as possible, and back to the mission whenever necessary.” Or as Vernetta Walker says, “Our decisions should stem from our mission, our planning should stem from our mission, and everything we do should essentially be in furtherance of our mission.”
2. **Ensure abundant resources:** This does mean, yes, being on board financially in the sense of making a personally meaningful financial contribution to the organization every year. But it’s human resources as well, in the form of a quality CEO and quality board colleagues. Finally, the public’s high regard for your organization is a resource.
3. **Provide oversight:** This covers the duties of care, loyalty, and obedience. Included in the duty of care is the all-important regular and meaningful CEO evaluation. Is she or he advancing the mission?

### Ten Basic Privileges of Nonprofit Boards

#### Provide Strategic Leadership

**Determine mission and purpose.** Create and review a statement of mission and purpose that articulates the organization’s goals, means and primary constituents served.

**Ensure effective planning.** Actively participate in an overall planning process and assist in implementing and monitoring the plan’s goals.

#### Ensure Abundant Resources

**Ensure abundant financial resources.** Secure abundant resources for the organization to fulfill its mission.

**Select the chief executive.** Reach consensus on the chief executive’s responsibilities and undertake a careful search to find the most qualified individual for the position.

**Build a competent board.** Articulate prerequisites for candidates, orient new members, and periodically and comprehensively evaluate your own performance.

**Enhance the organization’s public standing.** Clearly articulate the organization’s mission, accomplishments and goals to the public and garner support from the community.

#### Provide Oversight

**Monitor, and strengthen programs and services.** Determine which programs are consistent with the organization’s mission and monitor their effectiveness.

**Ensure legal and ethical integrity.** Adhere to legal standards and ethical norms.

**Protect assets and provide proper financial oversight.** Assist in developing the annual budget and ensuring proper financial controls are in place.

**Support and evaluate the chief executive.** Ensure the chief executive has the moral and professional support she or he needs to further the goals of the organization.

Source: Adapted from Richard T. Ingram, *Ten Basic Responsibilities of Nonprofit Boards, Second Edition* (BoardSource, 2009).

# TEN PRIVILEGES WORKSHEET

- Which of the ten privileges excite you the most? **Circle three.**
- Which of the ten privileges excite you the least? **Cross out three.**

Provide Strategic Leadership	Ensure Abundant Resources	Provide Oversight
Determine mission and purpose	Ensure abundant financial resources	Monitor, and strengthen programs and services
Ensure effective planning	Select the chief executive	Ensure legal and ethical integrity
	Build a competent board	Protect assets and provide proper financial oversight
	Enhance the organization's public standing	Support and evaluate the chief executive

- How much time per month can you devote to board service? **Circle one.**

1-3 Hours                      4-6 Hours                      7-10 Hours                      11+ Hours

- What kind of committee would interest you? **Circle one.**
- What kind of committee would not interest you? **Cross out one.**

- **Executive Committee**
  - Selecting the chief executive.
  - Ensuring legal and ethical integrity.
  - Supporting and evaluating the chief executive.
- **Finance Committee**
  - Protecting assets and providing proper financial oversight.
- **Fundraising Committee**
  - Ensuring abundant financial resources.
- **Governance/Nominating Committee**
  - Building a competent board.
- **Marketing Committee**
  - Enhancing the organization's public standing.
- **Strategic Thinking Committee**
  - Determining mission and purpose.
  - Ensuring effective planning.
  - Monitoring and strengthening programs and services.

- Boards often need people with specific professional training—e.g. attorneys and accountants. Do you want to use your professional training in your board role, or would you rather serve the board with skills developed outside of your professional training? **Circle one.**

I want to use my professional training in my board role.

I would rather serve the board with skills developed outside my professional training.

# FINDING THE RIGHT BOARD

## FIRST, READ THE QUOTE BELOW—TWICE!

After making a short list of organizations about whose missions you're passionate, next ...

### Test your passion and commitment

... by simply volunteering for the organization. You can directly do the work, or serve as an outside (non-board) member of a committee. Planning and fundraising committees for annual events make great places to start.

How, exactly? Don't complicate it or stress yourself out. Simply reach out any way you're comfortable to anyone you know at the organization, describe your passion for the mission, and say you'd like to contribute by volunteering. You might learn they're recruiting board members right now. You might learn they need non-board committee members. **Either way, you'll be practicing an important board member responsibility: Sharing your passion for the mission with others.**

### Look for organized recruitment

A good indicator of a strong board is an organized recruitment process, where you're expected to complete an application, be interviewed by the nominating committee, and have your nomination considered—but not necessarily approved!—by the full board.

“I believe the single most important element in being a successful board member and helping to make a board much more effective is your own interest and passion in the work of that group.

*Linda Crompton  
President/CEO, BoardSource*

### Look for larger board sizes

Watch out for really small boards: They may indicate ineffective organizations that can't attract board members. Larger boards typically have more committees where you can quickly contribute. They're also rated more effective in national surveys (specifically, those with 15-22 members).

### Proceed with your eyes wide open

Some boards won't meet some or even any of the above standards. That's a warning sign, but not a stop sign. If you're passionate about the mission and see yourself making a valuable contribution, go ahead and join the board. Just keep your eyes wide open, knowing your initial contribution may be helping the board do basic capacity-building tasks. That's important, mission-advancing work.

## Questions to Ask Yourself

### Goals

Are my goals the same as those of this organization and its board?

### Contributions to the Mission

Can I contribute skills, experience, or expertise that will increase the impact of the organization and help it advance its mission?

### Time Commitment

Am I prepared to commit the time required to fulfill my legal and fiduciary responsibilities as a board member?

### Financial Commitment

Am I required to give/raise money for this board and can/will I do that?

Source: Adapted from The Bridgespan Group, "Nonprofit Boards: How to Find a Rewarding Board Position."

# ACTION PLAN

## WHAT WILL YOU DO TO LEAD FROM STRENGTHS?

**Your Envisioned Future:** When you've successfully begun developing your leadership skills through board service, what will these people and things look like? How will they have changed?

- You
- Your career
- The nonprofit organization
- Your employer

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**Your Purpose Statement:** Why do you want to achieve this future?

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**Your Current Reality:** What's your current reality? What are the gaps between today and your envisioned future?

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**Specific Action Commitments:** What will you commit to doing to create your envisioned future?

<p><b>1</b></p> <hr/> <hr/>	<p><b>3</b></p> <hr/> <hr/>
<p><b>2</b></p> <hr/> <hr/>	<p><b>4</b></p> <hr/> <hr/>

# THE RIGHT BOARD WORKSHEET

## Programs

What is your mission?

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How do your programs advance the mission?

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\_\_\_\_\_ How often is your strategic plan reviewed and evaluated?

## Financial Status

\_\_\_\_\_ Is the organization financially sound?

\_\_\_\_\_ What is the organization's operating reserve, if any?

\_\_\_\_\_ How often do board members receive financial reports?

## Clients or Constituencies

Whom does the organization serve?

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\_\_\_\_\_ Are your clients or constituencies satisfied with the organization?

\_\_\_\_\_ How, and how often, do you ask clients/constituencies for their input on the organization's direction?

## The Board

\_\_\_\_\_ Are there written job descriptions for the board as a whole and for individual board members?

\_\_\_\_\_ Are there descriptions of board committee functions and responsibilities?

\_\_\_\_\_ Does the organization have directors and officers liability coverage?

## My Responsibilities

What are the ways you think I can contribute as a board member?

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What is the board's role in fund-raising?

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\_\_\_\_\_ Will I be expected to make a specific annual financial contribution?

\_\_\_\_\_ What's the total time commitment?

\_\_\_\_\_ Will I receive orientation to the organization and to the board's procedures?

\_\_\_\_\_ Do you provide opportunities for board development and education?

## The Organization's Staff

\_\_\_\_\_ Is the board satisfied with the executive staff's performance?

Source: Adapted from BoardSource, "What Should I Know Before Joining a Nonprofit Board?"

# ABOUT THE AUTHOR



John M. Fulwider, Ph.D., is a business coach, trainer, and consultant for nonprofit professionals, and a career coach for anyone. He helps people and teams:

- Assess where they are;
- Envision where they want to be;
- Measure the gap between the two;
- Make action plans to bridge the gap between the two; and
- Follow through on those plans to achieve success.

The plans often draw on ideas from the world's best business thinkers, which John adapts to the client's specific situation.

John has written two books:

- *The Nonprofit Book of Awesome: 25 Tips for Achieving Greater Mission Impact and Personal Fulfillment*
- *Leadership Pairs for Mission Impact: Effective Nonprofit Board President-Chief Executive Partnerships* (forthcoming in 2013)

John's coaching, speaking and consulting clients have included Big Brothers Big Sisters of the Midlands, Brain Injury Association of Kansas and Greater Kansas City, Brain Injury Association of Nebraska, Center for Rural Entrepreneurship, Child Advocacy Center, Goodwill Industries, Heartland Council of Community Foundations, Hope Center for Kids, Human Services Federation, Kearney Area Community Foundation, KZUM 89.3 FM, Lincoln American Marketing Association, Lincoln Arts Council, Lincoln/Lancaster County Habitat for Humanity, Lincoln's Young Professionals Group, Nebraska Community Foundation, NeighborWorks America, NeighborWorks Lincoln, State Farm Insurance, and Turbine Digital.

John has lived and traveled all over the world. He is a passionate foodie who can suggest what to eat, and where, in an impressive number of cities. While he charges a lot for his other services, his advice on eating out is always free.

John received all three of his degrees at the University of Nebraska and has no plans to ever leave Lincoln.

Five things you might not otherwise know about John:

- His favorite cuisines are Ethiopian, German, and Indian, in that order.
- He once completed a five-rappel descent off Cat in the Hat in the dark, without a headlamp.
- He's a redhead whose hair has gone dark. (Sad.)
- He still has the rock he used to (slowly) chip ice out of the wheel wells (all four!) of his Geo Metro one particularly wintry day in Boulder, Colorado, circa 1996.
- He adores functional public transportation systems with an abiding passion.

## CONTACT



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