

**A Necessary and Subjective Exercise - Mentoring and Monitoring****By Louis M. Markwith, Vice President**

In previous articles in this series, we have focused on recruiting and orienting the members of your Board of Trustees (Directors). In "It Begins with the First Conversation," I discussed the use of the *Moves Management* technique in identifying and cultivating potential new members to the Board. In "Don't miss the Handoff," I discussed the importance of a proper orientation of new Board members to get them started as successful additions to the Board.

At DeWitt and Associates, we like the term Trustee. We believe it accurately describes the role Board members play in "holding in trust" for the community the mission, goals, aspirations and clients served by the nonprofit organization.

**Effective Utilization of Board Talent**

The next step is utilizing Board members properly and effectively. Too often, organizations treat Board member like consistent donors and do not spend the appropriate time to nurture the relationship and increase the level of positive action by them. When an organization fails to properly acknowledge and involve a major donor, over time the donor loses interest and does not contribute. If continued cultivation and meaningful involvement do not occur, the same thing can happen to Board members that the organization has spent many hours and treasure to cultivate and recruit.

The lack of attention can lead to a disinterested and nonfunctioning Board member. At times, Board leadership will have to consider how to handle that "lost member." The discussion may be how to let the member go – "Fire a Board Member." "You cannot fire a volunteer" is phrase often heard in nonprofit organizations. But what is the alternative?

**Continue the Moves Management**

Just as an organization uses "Moves" to encourage a donor to remain as a giver, similar techniques a can be used to encourage members of a Board of Trustees (Directors). In the "Handoff" article, the mentor becomes an integral part of the orientation and education process for the new member. The mentor is senior leader on the Board and the person who shapes the career of a new member. This person works closely with the Board Chair and the CEO to insure the new member acquires institutional knowledge and understanding of the organizational policies. The relationship can build a strong bond with the nonprofit and motivate the new member.

As the interests and the talents of a new Board member become apparent, it is time to begin the managing the career of the new Trustee (Director). The goal is

to build a well rounded and enthusiastic Board member. The roles of a Trustee are: Steward, Policy-Maker, Ambassador, and Builder. In order to construct this “effective” Trustee (Director), the person must be exposed to the various areas of responsibility or roles.

The CEO working with the Board Chair should develop a proposed chart of progress similar to the chart of *Moves*. It outlines the path the new member will follow as he, or she, works in different Board committee assignments and projects with senior staff. As the new member gains more experience, the Trustee (Director) Chart should be updated to reflect the progress and accomplishments of the individual. Evaluation of a new member should be done informally by seeking input from the Mentor, Standing Committee Chairs and senior staff. In addition, the Board Chair should have conversation with the new member after each regular Board meeting to clarify any questions that were not answered in the meeting.

This information needs to be shared the Nominating Committee, Board Affairs Committee, or Committee on Governance, that is responsible for identification, cultivation and recruiting of new members. The committee should use the feedback about and from new members to continually refine its process of bring new members to the Board.

### **Using the Senior Staff**

The Senior Staff in a nonprofit organization can be of great assistance to the CEO and Board Chair in gauging the development of Trustees or Directors. Frequently, senior staff interacts more often with Board members than others on the Board. Their relationships with Board members can engage, encourage and motivate individual members stay on task. The Senior Staff can provide valuable insights to members about the positive progress of the organization. Staff can be valuable trainers for Board members in making prospect calls, in cultivation and the Board member’s role as an ambassador for the nonprofit

### **Formal Evaluation**

While the organization is evaluating the performance of the individual Trustee or Director, the nonprofit should be seeking a formal evaluation from each Board member at least annually. These individuals who hold the organization in trust have an important perspective on the progress and success of the organization. It is vital that each member feel that his, or her, input is valued and expected.

An annual written evaluation by the Board is a method for determining the attitudes and opinions of its most valuable constituency. The aggregate evaluation responses can point out where there are misunderstandings by the Board and perceived weaknesses in the nonprofit. The individual responses can

assist in the CEO and Board Chair in creating more effective communication between the board and the organization.

One-on-one conversations with each Board member conducted by the Board Chair and the CEO should be a part of the regular communication strategy.

These conversations demonstrate to each member that they are important to the nonprofit.

**What is it all about?**

It is really simple; it is all about communication. You built a strong foundation with the new member during the cultivation and recruitment process. Don't think you can let up. Their success as a Board member is the responsibility of the entire organization starting with the CEO and Board Chair.