

**ELEVEN QUESTIONS TO ASK  
BEFORE  
YOU BECOME A BOARD MEMBER**  
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1. Why do you want to be a Board Member?
  - a. Making a clear decision to become involved with, and an advocate for, an organization in the community
  - b. Beware of altruism – what do you want to get from this involvement?
  - c. Beware of **your own** agenda.
  
2. How much time can you commit to your Board responsibilities?
  - a. Being a good Board member takes time – ask how much they need/expect.
  - b. Boards need consistent time commitment – does this fit your plans?
  - c. Most Board members are expected to serve on a committee (perhaps even chair a committee). Are you open to this additional time commitment?
  - d. Most Boards have an annual retreat.
  - e. Most Board members are expected to help with fundraising. .
  
3. What type of Board do you want to be a part of?
  - a. Who else is on the Board? Are these your peers? Will you learn, gain from them? Is it representative of the community?
  - b. Three major stages of Boards:
    - 1). Early years of an agency - Board run agency, working Board, no staff, heavy time engagement.
    - 2). Adolescence of an agency - ED and office manager, ED works with the Board and directs much of their involvement, quite a bit of Board time needed, agency still undercapitalized and ED and staff working hard. Board Committee work crucial.
    - 3). Mature agency - fully staffed with ED, Fund Raiser, Program Officer(s), Office Manager and help, Volunteer Coordinator, Fiscal Officer.
  - c. The three stages, above, will define the nature of the Board work. For example, stage one Board Members need to fulfill *all* the duties of the agency. Fiscal is often the trickiest, daily oversight ranks right behind. Most Boards are inept at running the day-to-day operations of agencies.
  
4. What type of organization do you wish to work with?

What are you passionate about? Environment, Health, Poverty, Literacy, the Arts, etc  
Is there any group about whom you are particularly concerned? Children, Teens, the Elders, Families  
Do you care about local, regional, national or international issues?

5. How ready is the Board to enlist your services – have they done their due diligence?

- a. What materials are provided to you as part of the recruitment process?
- b. Is there a Board Member Job Description.
- c. Roles and Responsibilities
- d. Immunity and Liability issues addressed?
- e. Strategic Plan.
- f. Committee Structure and responsibility descriptions available?
- g. Board Annual Self-Evaluation.

6. What is the overall fiscal strength of the agency?

- a. In realistic terms, what is their fiscal strength?
- b. Diversified income streams and a strong fundraising plan.
- c. What did they raise, and from whom, *in the last few years*?
- d. Their budget, balance sheet.
- e. Staff salaries and benefits.
- f. Future commitments to capital improvements, major equipment expenditures.
- g. Are there one or two major donors, and are they on the Board?

7. How is the organization viewed in the community?

- a. How visible is the organization? What is the reputation?
- b. Ask around amongst your friends and colleagues
- c. Perhaps (with delicacy) ask clients of the agency
- d. Ask United Way or the Chamber of Commerce

8. What is the culture of the board?

- a. Ask to see minutes of the last board meeting.
- b. Is there an attendance policy in the Bylaws?
- c. Do meetings start and end on time?
- d. Are meetings led by the President/Chair
- e. Are committee reports clear and concise with clear recommendations for Board action?
- f. Are term limits established and enforced?
- g. Is the founder still on the Board?

9. What commitment does the organization have for staff and board training?

- a. Are annual ED evaluations conducted by the Board?
- b. Has the ED conducted annual evaluations for each staff member?
- c. How much money is in the line item for professional development?
- d. Do staff and Board attend conferences or courses together?
- e. How does the Board get training?
- f. Is there an annual Board retreat that lasts *at least* 6 hours?

10. What did I see/feel during a site visit?

11. Does the organization have D&O insurance for its board members?