

# Turning Good Into Great

How to transform a good agency board  
into an all-star leadership group

Presentation by Perry Davis Associates  
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25 W. 45<sup>th</sup> St, Suite 1405  
New York, NY 10036



(212) 840-1166  
info@perrydavis.com

# A GREAT BOARD IS THE KEY TO YOUR SUCCESS

25 W. 45<sup>th</sup> St, Suite 1405  
New York, NY 10036



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info@perrydavis.com

# The kinds of board members that we meet:

- A great trustee
- One who meets expectations
- Someone who's working on it; and
- The trustee who's got a long, long way to go

*At the end of this presentation,  
we'll be defining the characteristics of each*

**“Give, get...or get out of the way.”**

*True or False?*

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# The five key contributions of effective board members

- Giving
- Getting
- Leading/Participating
- Networking
- Guiding

# Contribution #1: Giving

- It's not just one contribution – special events and capital expectations
- Minimum gifts: how to set the bar
- Who solicits board members? Why?
- What other funders think about board giving

# Contribution #1: Giving

A great trustee:

- Makes significant annual gifts, considering what s/he can afford
- Makes gifts above the minimum required
- If able, makes a pacesetter gift
- Or: provides significant in-kind professional services

# Contribution #2: Getting

- Most of the time, people don't give to causes – they give to friends (It's sad...but true.)
- If you don't ask, you don't get.
- There are many definitions of success.
  - For example, 90% of the work is just getting the meeting.
- Follow up and follow up again.

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# Contribution #2: Getting

A great trustee:

- Raises significant funds from others.
- Goes on solicitation calls with the executive director.
- Helps bring in government funds as appropriate.
- Makes appointments for the executive director and others to meet with five new donor prospects annually.

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# Contribution #3: Leading/Participating

- The greater the involvement, the more the satisfaction
- Define engagement: chair committees; attend meetings and events
- Effective meetings can shape (eventual) effective leaders
  - Structured and well prepared agenda items
  - Discussions, not just reports
  - Decision making

# Contribution #3: Leading/Participating

And leading also means being a witness – and inviting others to witness, as well

- Site visits
- Meet the clients
- Volunteer, as appropriate, to get a sense of the services

# Contribution #3: Leading/Participating

A great trustee will:

- Serve as an officer or committee chair; or participates actively on two or more committees.
- Attends most board meetings.
- Attends gala and other fundraising events.
- Has visited all agency sites/has gone on missions.

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# Contribution #4: Networking

Effective networking means opening doors and providing access to those who can help your agency.

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# Contribution #4: Networking

The effective networker is the best agency ambassador:

- Every trustee needs an elevator speech:
  - Agency purpose: the challenge it is solving
  - Whom it serves and how many
  - Impact and vision
  - Three superlatives (best, largest, most...)
  - “I” in the story

# Contribution #4: Networking

A great trustee:

- Can tell the agency story well
- Boosts the agency at every opportunity
- Hosts friend-raising events
- Can recruit volunteers as appropriate

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# Contribution #5: Guiding

Setting agency policy means focusing on the big picture...being a part of the brain trust...and exercising effective fiduciary responsibility

What are the key decisions that must be made – and that only the board can make?

The executive director reports to the board. All other staff reports to the executive director.

# Contribution #5: Guiding

A great trustee will:

- Lead policy discussions having been fully educated on the issues.
- Understand how to work effectively with professional staff (division of powers).
- Nominate new trustees.

# Rating your Trustees

Why rate your trustees?

Who rates them?

Choosing the point system or creating a profile

*How many outstanding board members do you have? How many have the potential to become great?*

# How to Rate a Great Trustee

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[info@perrydavis.com](mailto:info@perrydavis.com)

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