

A Quick Guide to a Gratifying Volunteer Board Experience

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The decision to volunteer as a board member means a sacrifice of time and energy. It also opens doors of opportunity. To help maximize this privilege on multiple levels, I suggest the following:

Seek First to Understand

Obtaining a firm grasp of essential facts is a smart first step in any new venture, and your board orientation will likely deliver this factual foundation. Reflect on the mission and vision, and study governing documents such as bylaws, policies and procedures, and/or position statements. Peruse some board meeting minutes to appreciate recent decisions and discussion topics. Learn the financial facts regarding annual revenue, annual expenses and net assets, and a five-year trend of each. Inquire about conflicts of interest, strategic alliances or formal partnerships. In addition, start to assess what “lightning rod” issues might exist and gauge how decisions are made and how progress against stated objectives is measured and reported.

As a board member, you will likely be asked to serve on a committee. Take time to consider the committee charter and how it aligns with the association’s broader mission and strategic plan. Learn what staff resources serve the committee, and what explicit expectations exist for committee members. And understand the decision authority of the committee and where the committee is addressed in the financial budget.

Beyond the facts, begin to appreciate what methods of communication are preferred and have historically been most effective for the organization. Do emails, phone calls, or in-person meetings best fit the communication styles of your fellow board members and staff? How frequent and how formal are those communications? By determining the accepted norms, you’ll be equipped to accelerate and maximize your enjoyment and contributions.

Bring a Mindful Purpose

Agreeing to serve is a big commitment, so be reflective and mindful regarding why you’ve done it. At the outset, ask yourself, “Why am I doing this?” This self-awareness will increase the likelihood of being fulfilled.

Three primary motives typically spur one to join a board, and it’s helpful to identify which one is driving you:

1. Do you want to become more knowledgeable about the industry or profession that your organization supports? Will a “seat at the table” of industry-wide decision-making benefit your company? Will your service open doors to industry relationships and help navigate future challenges? These are all acceptable and admirable drivers, but don’t forget your commitment to putting the *organization’s* needs above all else.
2. Do you want to enhance professional skills and overall development? This could mean strengthening your ability to achieve consensus, fine-tuning communication techniques, and honing your management and/or leadership skills. Board service may provide opportunities that don’t exist in your day job, or simply a different environment or dynamic to test what you feel you already know.
3. Do you want to give back, share your expertise and lift others? Serving on a board can open all these doors, whether it’s through participating in a mentorship program to connect with next-generation leaders, serving as an industry historian to preserve meaningful archives, or forming a peer group to offer career counsel and support.

All three motivations are compelling reasons to join a volunteer board, but it’s challenging to satisfy all at once. It’s important to choose which motivation means the most to you, and then self-manage your decisions, time and behaviors accordingly. You may even want to share your motivation with

the board president, to proactively establish context for your future contributions.

Remember the Golden Rule

Simple things are often taught early in life, and the Golden Rule is one of them. As you participate within the board, resist negative human nature and the unattractive trappings of title, achievement and perceived entitlement. Keep the word respect top of mind, especially regarding each individual voice among the board. Those voices reflect diverse knowledge, experience, perspective and motivation. They also reflect diverse skills, talents and natural behavioral tendencies. Challenge yourself to glean value from all this diversity, and help foster an environment where all voices are heard. And remember that your voice matters too, so don't sit on the sidelines and let individuals or the group dynamic intimidate you. To quote Facebook COO Sheryl Sandberg, "Lean in!"

You'll likely hear frequent reference to culture when discussing the organization, or how the board works. Thoughtfully respect what you discern as the true culture of the organization and actively honor it. It's important. However, culture is a manifestation of a lot of things, so be sharp and critical to distinguish culture from habit.

Perhaps above all else, respect the need to speak outside the board room as one voice. You may personally disagree with a board decision, but you are obligated to place the needs and interests of the whole organization ahead of your feelings or opinions. Respect the process, and respect the value of a united board — both are necessary ingredients for the success of the organization. Failure to speak as one voice can lead to factions, rumors, wasted energy and drama that no one wants or needs.

A final thing to respect: the need for fun! No doubt you'll take seriously your commitment, your role/accountability and the stewardship of your organization. In doing your work, however, you don't need to always take yourself seriously. There's value in lightening up, laughing often and finding humor even in challenging situations. It'll help the board dynamic and life's too short to live otherwise.

You're a busy, successful person and your board service will compete for time and energy with all the other parts of your life. A little premeditated consideration of the three areas outlined above can go a long way toward helping ensure that you have a gratifying volunteer experience and maximize your impact upon the short- and long-term objectives and health of the organization you serve.