In the Chat

- Your Name
- Your Synagogue
- Your Role
- One Word that Describes Your High Holiday Experience
Introduction of Nanette Fridman

- President of Fridman Strategies, Inc.
- 25+ years of experience with nonprofits as a professional, lay leader, consultant & coach
- National speaker, trainer and facilitator
- Author of two books, *On Board* and *Holding the Gavel*
- BA, Tufts University
- MPP, Georgetown University Public Policy Institute
- JD, Georgetown University Law Center
- Harry S. Truman Scholar
Agenda

- Welcome – Kimberlee Schumacher, VP Partnerships & Services at CJP
- Presentation – Nanette Fridman, Facilitator
- Q&A
- Breakout Rooms ~11:30 pm
  - Continued Governance Q&A with Nanette
  - Networking/Learning from Colleagues and Getting to Know Each Other with Andrew Kastner, VP of Jewish Life at CJP
- Concluding Remarks & Post-Event Survey – Kimberlee
Goals for this Session

1. Discuss how to create an intentional pipeline and the process for recruiting board members.
2. Share ideas for developing and evaluating board leadership.
3. Highlight steps for effective committees.
4. Learn how to plan for succession.
Start with Why

• To maintain and grow leadership for a vital and sustainable congregation, a continuous pipeline of prospective and developed board members is required.

• For your synagogue to have a continuous and robust pipeline, intentional steps are essential and must be prioritized and activated.
Intentional Pipeline & Recruitment Process
Who’s in the Pipeline?

- Committee Members
- Volunteers
- Donors
- Members Who Show Up
- Community Leaders
- People who Self-Identify via Application
- Others?
Process

Identify  Cultivate  Recruit  Train  Steward  Retain
Board Composition

- Customize a board matrix based on your synagogue
  - Current Board Service
  - Competencies & Experience
  - Individual Attributes & Characteristics
  - Networks
  - Strategic Direction Alignment

- Nominating or leadership development committee maintains and reviews regularly
• Time to Give
• Has already made or is willing to make a Commitment
• Personality
• Relative to the others in leadership
• Good fit to work with the professionals
• Motivation
• Other?
Board Cultivation & Recruitment

- Who is best connected to the prospects (if anyone)?
- What is their current level of engagement?
- What do they already know about your synagogue and board?
- How can they be cultivated?
Benefits of Becoming a Board Member

- Social connection
- Pay back/pay forward
- Values/altruistic/warm glow
- Engage deeply in the community
- Community standing
- Professional connections and skills
- Modeling
- Securing the synagogue’s future
- Develop skills, learn and grow
- Other?
• Build social connection.
• Thank you for. . .
• Present the synagogue and the board (job description)
• **Ask – Will you join me in volunteering on the board to make an impact in people’s lives and our community? Explain why the prospect is UNIQUELY QUALIFIED TO SERVE ON THIS BOARD AT THIS TIME.**
• Silence!
• **Questions/objections and concerns are common. Answer them.**
• Sell the benefits of being involved.
• Confirm outcome. Thank again!
• Report out. Answer any open questions.
Developing & Evaluating the Board
Board Maintenance

- Keep running list of names considered – decision made and outcome
- Board onboarding
- Assess training needs
- Steward board members
- Board evaluation
- Look at upcoming term dates and for holes in skills/competencies, attributes or networks and try to add appropriate people to committees to build your pipeline
- Look at officers and start succession conversations
Board Development

• Onboarding
• Training
  • Roles & Responsibilities
  • Financial Literacy
  • Storytelling
  • Ambassadorship
  • Financial Resource Development (including solicitation training)
• Conferences
• Mentoring
Effective Committees
Strategic Committee Recruitment

Look at the skills needed both now and directionally

Look at people who are terming out or rolling off
What are the key ingredients to successful committees?

- A clear **charge** or purpose
- Articulated **goals** that align with the overall strategic goals
- A **work plan** that outlines how the work will get done, when and by whom
- A volunteer **leader** who has a **job description**
- **Volunteers** who have **job descriptions** and are **committed**
- A **staff** point person or liaison
- **Ground rules** that include respect, confidentiality and sharing air
- Well-planned & facilitated **meetings**
- Work time & meeting **time**
- A clear understanding of **reporting expectations** to board (when/how)
Effective Committee Management

Ask people which committee they want to serve on, match people to a committee that suits their skills and interests.

Give committees time to organize/meet.

Empower the committees to bring recommendations to the board and to take action.

Highlight one committee each board meeting and report in writing ahead of time about all.

Align the work of the committees and overall priorities and strategies.

Give the committees respect, gratitude and kavod.
Succession Planning
Succession

Do you know who will succeed your current chair and officers?

“Hello, J.G.? I’ve found a volunteer who’s willing to head up the fund drive!”
Ideal Succession Planning

- 1-2 years *in residency*
- Designee in the loop
- Coaching by organizational leaders
- Mentoring by outgoing chair or past leaders
- Boot camp hand-off only if necessary
Start Early

- Succession planning starts early
- Lay leader and professional should discuss and put on agenda for *every quarter*
- Maintain a database of prospects
- Evaluations can surface potential leaders
- Informal conversations are encouraged
  - *Could you see yourself as Chair or as an Officer?*
  - *Are you interested in serving as Chair or as an Officer?*
- Ask for recommendations from current and past Board and committee members
- Look broadly, ask committees, donors, staff, & community partners for recommendations
Job Description

- What are the current position's responsibilities?
- How is the job going to change, if at all?
- How long is the position?
- What is the expected weekly time commitment?
- What training is given?
- What support is provided?
- With whom would the person work with on the professional staff? Other lay leaders?
- What are the big issues the synagogue expects to be dealing with?
Having Trouble with Succession - Why?

- Are you open to a different type of leader?
- Are you looking beyond the usual suspects?
  - Experienced “Outsider”
  - Inexperienced “Insider”
- Consider job descriptions and roles may have to be redefined or negotiated
- Are you selling the experience and the team?
- Have you considered co-chairs?
- Who is asking?
- Why are people saying no?
Next Steps

- Strategically recruit committee members
- Convene the nominating committee early!
- Draft board member and officer job descriptions
- Design a board matrix and perform a gap analysis
- Create an application if desired
- Outreach for new prospective board members
- Create a database
- Have conversations/interviews
- Design/update your onboarding experience
- Schedule trainings
- Design/update your board evaluation
- Begin succession conversations
“The single biggest way to impact an organization is to focus on leadership development. There is almost no limit to the potential of an organization that recruits good people, raises them up as leaders and continually develops them.”

-John Maxwell
Breakout Rooms

- 11:30 - 11:50 am
  - Continued Governance Q&A with Nanette
  - Networking/Learning from Colleagues and Getting to Know Each Other with Andrew Kastner, VP of Jewish Life
- Return to main room at 11:50 am
• 11/18 10:30 am-12 pm Ambassadorship
• 1/20 10:30 am-12 pm Solicitation Training
• 2/10 10:30 am-12 pm Open Forum – For past participants in the series