

BOARD MEMBER  
SELF-ASSESSMENT



**ASPIRING BOARD MEMBER READINESS**

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**SELF-ASSESSMENT**

## IS NONPROFIT BOARD SERVICE RIGHT FOR YOU?

Serving on a board can be an amazing experience, but it is also demanding. So, before joining a board, ask yourself if board service is right for you. Here are four common questions to consider:

### What type of experience is most fulfilling for you?

Board service is a form of volunteerism that can have a huge impact on the organization and its community, but if you think that your sense of personal fulfillment requires a more hands-on volunteer opportunity, you might want to inquire about direct-service volunteering opportunities in the organization instead of board service.

### How much time are you willing to put into board work?

Board members are legally required to fulfill their fiduciary duties, which will require you to devote a considerable amount of time to the organization. The amount of time varies greatly by organization, but simply planning to attend the board meetings is not sufficient. Board members must be willing to regularly review financial statements and meeting materials, and many board members will need to prepare for and attend committee meetings in addition to board meetings.

### Are you willing to collaborate with others on a regular basis or would you prefer to work alone?

Boards are teams of committed and engaged individuals who work together to govern the organization. If you prefer to work alone, then board service may not be the right way for you to work with the organization. Consider providing pro bono professional services or direct-service volunteering as alternatives to board service.

### Do you have the willingness and the ability to assist a nonprofit organization with fundraising?

One of the primary responsibilities of the board is to ensure that the organization has adequate financial resources to carry out its mission. Many organizations have a fundraising policy for board members. These policies typically request board members to contribute personally. Commonly, these policies also stipulate that all board members participate in the organization's fundraising effort in some fashion. Connections and introductions to donors, participation in fundraising events, personal notes on solicitation and thank-you letters, and direct solicitations are just a few of the ways in which board members can make a difference in terms of fundraising success. The amount of involvement in fundraising varies greatly by organization, but prior to serving on a board, make sure that you will be comfortable making a personal financial contribution and asking others to contribute to the organization.

After evaluating these four questions, take our **readiness quiz** → to find out if you are ready to serve on a board.



## BOARD SERVICE READINESS QUIZ

While board service can be an extremely rewarding experience and can greatly impact the organization, it may not be the right fit for you at this time of your life. But — if the following statements apply to you — it just might be.

1. I am interested in advancing a cause that I feel passionate about.
2. I am curious to delve into and learn about issues facing my community and the world.
3. I am interested in a new environment and experience to further develop myself as a leader.
4. I am interested in meeting people outside of my usual professional and social circles.
5. I understand the roles and responsibilities of being a board member.
6. I am comfortable making a personal contribution to the organization.
7. I can imagine asking others to contribute financially to a cause that I am passionate about.
8. I have enough autonomy in my schedule to accommodate board and committee meetings.
9. I am patient and collegial when working as a team.
10. I can commit the time necessary to be an exceptional board member.

If three or more of the above statements do not apply to you, then you may want to [consider other ways to get involved](#) with an organization prior to joining the board such as volunteering, pro bono professional service, or serving on advisory groups or committees.

## GETTING STARTED IN BOARD SERVICE

Follow these four steps to guide you through the recruitment process.

### 1 Find your passion.

The first and most important step is to identify what type of organization you might want to be involved with. Is there a particular cause or mission that you are passionate about? Is there an organization that you've been volunteering for that might have an opportunity to get more involved? Do you donate funds to a cause that you'd like to support with your talents? If you're going to dedicate the time and energy that board service requires, you want to make sure that you're doing it for an organization and mission that you really care about. For that reason, the first step in finding a board service opportunity is figuring out what you're passionate about.

Common nonprofit organization mission areas for you to consider include animal welfare, community improvement, education, health, philanthropy, social justice, youth-focused, and more.

Instead of a particular mission area, are you interested in organizations that serve a certain community or geography? There are many nonprofit organizations that focus their work on a particular community. To see a list of organizations located in a specific community, search for that location on [Guidestar.org](https://www.guidestar.org). Your local United Way or nonprofit association may have information on nonprofit organizations in your area.

### Consider your expertise

Many boards seek members who have professional backgrounds or experience in the organization's mission area. Why? Because their expert opinions and ability to assess an issue adds value to the board's decision-making process. A professional may be able to detect a detail or raise a question that otherwise would go unnoticed or ignored. Including board members with professional backgrounds in the organization's mission area adds diversity to the board and can promote additional creativity and innovation.

If you are a professional or technical expert and feel that a board would benefit from your expertise, don't hesitate to let the organization know. But keep in mind that there is a difference between serving on the organization's board and offering your professional services to the organization. In all-volunteer organizations (organizations without paid staff), board members with expertise in a particular area can find themselves in the difficult position of trying to define their roles as active and contributing board members while also being asked to perform professional services. In most cases, board members with a technical background benefit the board best as advisors rather than as direct-service providers.

For additional information, review our member resource, [Providers of Professional Services as Board Members](#), and our publication, [The Business Professional's Guide to Nonprofit Board Service](#).



[Learn more about how your expertise can benefit the board and the organization.](#)



## MAKING THE MATCH

Check out our free webinar, Making The Match: Getting Started in Board Service.



## Understand the organization's needs

It is important to understand that serving on a board is not a one-size-fits-all experience. All or at least most organizations need board members who are actively engaged in board decision making and who have connections to important networks or contacts. Other board needs vary greatly depending on the type and size of the organization. For example, a college or large museum is likely looking for board members who can make a very high personal financial contribution and who have the ability to raise money, while an all-volunteer organization will likely be looking for a board member who can devote a great deal of time to help manage the organization because there are no paid staff members. Because of this variance, it is very important to read the job description/profile carefully and ask questions to make sure you will be able to meet the organization's needs.

Once you know which mission area to focus on and which type of organization best suits your interests, availability, and personal goals, the next step is to identify a board service opportunity.

## Locate an open board position.

In addition to many local board-matching programs, there are three nationwide sites where you can search for organizations that are actively searching for board members: Bridgespan, boardnetUSA, LinkedIn

Several other organizations [post open board positions or have matching programs available by region](#).

Another option is to indicate your interest in serving on a nonprofit board on LinkedIn in the Volunteer Experience & Causes section of your profile, which will make it easier for organizations seeking board members to find you!

### Don't wait to be asked

If your search indicates that a potential organization in which you are interested does not have any current board openings, don't be afraid to reach out to the organization to express your interest. The most effective board members are individuals who are truly passionate about what an organization does; are willing to commit time, resources, and energy to strengthen and sustain it; and embrace board service as a serious commitment. Self-identifying your commitment to an organization is a first step in the right direction.

There is power in knowing what you want and going after it. However, it is important to do your homework and learn about the organizations that interest you before you express interest in serving on the board.

### Learn more about the organization

An informed candidate has a much better chance of being invited to join a board than an uninformed candidate. Here are some easy ways to learn more about the organizations on your list:



## HELPFUL RESOURCES

### Free Community Resource

[Joining a Nonprofit Board](#)

### Member Resource

[Providers of Professional Services as Board Members](#)

### Publication

[The Business Professional's Guide to Nonprofit Board Service](#)

1. Study the organization's website and read its annual report.
2. Visit [Guidestar.org](https://www.guidestar.org) to get a broad picture of the organization, its mission, leaders, and overall financial health. Read the organization's most recent Form 990 and audited financial statements, and watch out for some of these important considerations:
  - Did the organization run a deficit in the most recent year? If the organization is operating at a deficit, be sure you understand why and how it is addressing the deficit moving forward. A deficit without a specific plan for how it will be avoided in the future could indicate a shaky financial situation.
  - Does the organization have at least five or more "independent" board members as defined by the IRS? If the organization does not have at least a core group of independent board members, it may not have strong governance practices in place. If there are any non-independent board members, be sure to follow up with the organization to understand who they are and the nature of their relationships to the organization.
  - Does any recent news coverage of the organization flag exciting opportunities or potential concerns? An internet search will help you surface this information.

In addition, be aware of any potential conflicts of interest between your personal and professional concerns and the interests of the organization. There will always be some conflicts, but if your interests and the interests of the organization are likely to conflict on a frequent basis, then serving on the board will not be a good fit for you or for the organization. For more information about conflicts of interest, check out our [free FAQ for Legal and Compliance Issues](#).

Once you find a board service opportunity that appeals to your interests, availability, and personal goals, and you've done your research to find out what the organization does and how well it does it, you're ready to engage directly with the nonprofit in the board recruitment process.



## Connect with the Nonprofit Board.

### Express interest

In general, the recruitment process begins when a candidate expresses interest in a position. This can occur through a formal outreach program or by responding to a board recruitment posting, like you can find on LinkedIn or other board or job posting sites.

Alternatively, if the organization that interests you does not have a formal outreach program or any open board postings, then you can be proactive and contact it directly to express your interest.

Prior to reaching out, you should understand that some organizations prefer to have prospective board members serve on a committee or task force first. This is a great opportunity for you to evaluate the culture of the board, and it allows the organization to assess your commitment and passion for the mission.



## HELPFUL RESOURCES

### Free Community Resources

- [Joining a Nonprofit Board](#)
- [Coming to Terms with a Conflict of Interest](#)
- [Financial and Fundraising Issues – FAQs](#)
- [Legal and Compliance Issues – FAQs](#)

### Publications

[Managing Conflicts of Interest](#)

Whether you follow a formal outreach process or contact the organization directly, these tips will help you establish your credibility as a candidate:

- Be familiar with the organization, its activities, and its challenges.
- Be proactive, ask questions, and answer questions thoroughly.
- Be prepared to articulate how your skills and leadership experiences can benefit the board and organization.

### Interview

The interview process is the most critical step in the recruiting process. This is the opportunity for

- you to understand what is expected of you as a board member
- the board to understand how your skills, talents, experiences, and perspectives will enhance the board's ability to advance the mission of the organization

You should prepare questions to ask and be prepared to answer many questions about you. You want to be part of an organization with a well-planned process that treats recruitment as a two-way street. View our free resources to spark ideas about the [questions you should ask](#) and prepare you for the [questions you may be asked](#).

Both parties should get what they are looking for. Being willing and able is not enough. You must fill a need on the board at a given moment. You may bring marketing acumen to the mix at just the right time, for example, or the board may be trying to fill a gap in financial expertise.

Effective boards combine various skills, talents, backgrounds, and perspectives, and they often use a matrix of their present composition and future needs as a recruitment tool.

Even more important, you should leave these conversations with a firm understanding of what is expected of you as a board member and of what the organization's current challenges and opportunities are. Use this information to evaluate whether joining this board at this time is the right fit for you and for the organization.

### Evaluate the fit

Only you can determine if a specific board service opportunity is the right one for you. Here are some questions to ask yourself as you consider a specific board opportunity:

- Am I excited about this organization and the work that it does? Is this a cause or mission that I want to dedicate my time, energy, and money to support and lead?
- Can I have a positive impact? Is there an opportunity for me to make a difference in this organization? Can I help propel this organization forward with my expertise and connections?
- Do I feel comfortable with the overall health of the organization? Do I know what the challenges and opportunities are, and am I comfortable with the level of risk that I will be assuming as a part of my legal responsibility as a board member?
- Do I like and trust the people who are affiliated with the organization? Do I want to spend time working with these people? Do I think I can work well with them and be a positive part of the board's culture?

- Am I comfortable with the financial and time commitments necessary to serve on this board? Am I comfortable with all elements outlined in the board member job description?

### When to say “no” to an opportunity

In an ideal world, you would be confident about joining a board after you had asked questions and gathered data ahead of time. But sometimes, even after diligent preparation, you may hesitate or have second thoughts. You might learn that there is a considerable budget deficit, for example, or that there is a problem with the executive leadership. Or you might not feel as excited about the organization as you thought you would. Always trust your instincts, and decline the invitation if you have concerns or if the match just does not feel right.

Reasons for deciding not to join a board might include [financial concerns](#), lack of mission connection, time commitment, inadequate information about the organization, overall responsibilities, [lack of liability insurance](#), and management concerns.

When you give the board your final answer, be honest about why you are declining the invitation. Explain your reasons for saying no. The board should be grateful for your openness.

Your information may help the board with future recruitment and prompt it to look for candidates who are willing and likely to take on the responsibilities. The board may also learn that it must be forthcoming with future prospects about the state of the organization.

In addition to being willing to say no to a board service opportunity, it is important to accept a no from the organization as well.

### Always accept “no” for an answer

Board service is a two-way street. A good match meets the priorities of both sides. It also may be possible that you’re not the best match given the board’s current needs, but you might be a good choice later. Just because a specific board service opportunity seems like the right fit for you does not mean it will be the right fit for the organization. It’s critical that organizations and individuals are honest about what they both are looking for and need.

If this particular organization isn’t currently looking for someone with your experience and background, that’s OK. Leave the door open with the organization, and don’t give up. There are always other organizations that could benefit from your service.



## HELPFUL RESOURCES

### Free Community Resources

- [Joining a Nonprofit Board](#)
- [Board Responsibilities and Structures – FAQs](#)
- [Evaluating the Fit of a Board Service Opportunity](#)
- [Questions to Ask Before Joining a Board](#)
- [Questions the Organization Will Ask You as a Prospective Board Candidate](#)
- [Financial and Fundraising Issues – FAQs](#)
- [Legal and Compliance Issues – FAQs](#)

### Member Resources

- [Why is D&O Insurance Important?](#)



## Be an Exceptional Board Member.

Congratulations! Your preparation and diligence have paid off, and an organization whose mission you care deeply about has extended you an invitation to join its board. Now the hard work begins.

Before attending your first board meeting, you should educate yourself on the roles and responsibilities of board members and attend the organization's board member orientation.

### Board member roles and responsibilities

Board membership is not just an honorary position, a social activity with friends, or a simple team exercise. Above all, it comes with legal expectations and liabilities. This is the most important concept to understand about board service. Every board member is responsible for his or her own actions — or failure to act — on the board. BoardSource offers free resources to introduce you to the topics you will encounter as a new board member.

BoardSource also offers a [certificate program](#) that covers the fundamental nonprofit governance concepts every nonprofit leader should understand, including board structure and practices, the roles and responsibilities of board members, and financial and legal oversight.

### Board member orientation

BoardSource recommends that every organization offer a formal onboarding process for new board members. Make sure you attend your board's orientation sessions and ask questions throughout.

During the orientation, learn about the board culture. Understand how the members work together and how you can be an effective participant. Prior to your first meeting, you should review the organizations' bylaws and previous financial statements.

### Tips for being an exceptional board member

Board service is probably the most demanding volunteer activity. To best serve the board and the organization, follow these tips:

- Accept committee and board assignments with enthusiasm — and then follow through. Use all your professional skills to draft recommendations, carry out tasks, and help the board do its work between meetings.
- Come to meetings prepared; ask questions when something seems unusual or when you do not understand something.



Our [New Board Member Collection](#) has everything you need to be ready to hit the ground running as a board member.

[Understanding Nonprofit Financial Statements](#)

[Ten Basic Responsibilities of Nonprofit Boards](#)

[The Nonprofit Board Answer Book](#)

[Board Fundamentals](#)

- Be prepared to respect and learn from different viewpoints on the board while participating in robust discussions to find the best options for the organization.

### Get excited!

You soon will be an ambassador of the organization. Get ready to spread the good word among your friends and acquaintances.

Are you a BoardSource member? If so, you can prepare for your new role by accessing the hundreds of additional resources available in the [Topics section](#) of our website and participating in our complimentary webinars, which are listed on our [Training Calendar](#).



## HELPFUL RESOURCES

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### Free Community Resources

- [Board Orientation](#)
- [Board Responsibilities and Structures – FAQs](#)
- [Bylaws](#)
- [Financial and Fundraising Issues – FAQs](#)

### Board Member Training and Development

- [Certificate of Nonprofit Board Education](#)