

Transcript

Episode 117 – [From Recruitment to Recommitment, Building the Board You Need with Kate Hayes](#)

Dolph Goldenburg: Welcome to the Successful Nonprofits™ Podcast. I'm your host Dolph Goldenburg. Today, we will be chatting with Kate Hayes of Echoing Green about building an early board, but before we do, I just want to remind listeners about something new that Successful Nonprofits™ is doing this year. Over the past year, I've had a number of organizations that had said to me how much they would benefit from the participatory strategic planning process that I use, but that they just cannot afford the cost of having a professional consultant, whether it's me or somebody else, facilitate that process for them. So, to help organizations like this, and it might be like your organization, Successful Nonprofits™ is offering a Strategic Planning Facilitator Cohort Group, and that will enable your organization to develop and implement a strategic plan with the participation and guidance of a dedicated volunteer leader. Now, your leadership volunteer would participate in biweekly online cohort sessions to learn and apply the proprietary, proven participatory strategic planning process that we have developed and Successful Nonprofits™.

The keywords here, though, are *learn* and *apply*. This is not a passive instructional format. Participants will implement each lesson as the course unfolds. So, it's not like in Grad school where we learned stuff and we're like, when am I ever going to use it? You learn it, and you use it about a week or ten days later. Now, enrolling in this workshop and, of course, doing the work (because if you enroll and don't do the work, it's pointless) is an incredible opportunity for small and medium-sized nonprofits that really just feel like they cannot afford a full-on consultant to help them. Now, we are offering some early registration discounts that start at 2,500, so make sure you check this out at www.successfulnonprofits.com. Let me also say that when you go there, you cannot sign up at the website. What you can do is learn about it and read more about it, but actually participating requires that we have a conversation with you about the process because we only want to enroll organizations that we believe will succeed in the cohort group.

Now, with that quick promo about something we are doing out of the way, let me tell you about today's guest, Kate Hayes of Echoing Green. She is a leadership and board development expert. She has used experiential and immersive practices such as trips to Africa and Latin America to help board members really get the impact of the organization that they are serving on as a board member. Now, that's pretty cool stuff, right? I certainly think it is, and I have to share with you that, as someone who has taken an international trip as part of a philanthropic organization that I work with, it really is life changing; it really does bring you a lot closer to the mission. Today, we're going to wind it back and also talk about what needs to be in place early on in board development. Kate is in a unique position to talk about the very early stages of nonprofit board creation, and I'm really excited to have her on to share a little bit about it.

In my 25 years of working with nonprofits, I have encountered more than one board that had clearly been created using what I refer to as the "Friends and Family Plan." In fact, just talking to

the board, I could almost hear the executive director when he or she was recruiting them saying, “Don't worry, yoga buddy. I'm not going to ask you to do anything. I just need you to be on the board. You don't have to do anything. Maybe one or two meetings a year.” And you know what, I'd be willing to bet you that that board member met the expectations that were set, which were don't do anything. Just come to a meeting once a year. So, let's get some ideas from Kate about how we can all avoid the Friends and Family Plan on the board.

Hey Kate, welcome to the podcast.

Kate Hayes: Hi. Thanks for having me, Dolph.

Dolph Goldenburg: So, let me ask you, how did you first start to get interested in the early stage board?

Kate Hayes: That's a great question. I started getting interested in early stage boards as I joined the team at Echoing Green and started working with our social entrepreneurs who have innovative nonprofits around the globe. I started to hear frequent questions around those early stage boards. I had been involved with boards for a while, but there seemed to be so many [pain] points happening, like you said with those early, early stage boards. The biggest question that kept coming up was, how do I take my board from the friends and family that helped me sign my 501c3 papers to something that can actually support me and the organization and getting to that next level? As I continued to hear these pain points, I said, “There's gotta be something that I can do that we can do to help address these issues and help organizations and executive directors push past that Friends and Family Plan into something much more robust that can grow with the organization.”

Dolph Goldenburg: I have to share with you, I call it Friends and Family because back in the eighties or nineties, there was a long-distance phone carrier called MCI, which is now Sprint. They used to have what they called the Friends and Family Plan. Normally, it would cost you 50 cents a minute to call long distance. By the way, I totally know for millennials out there, you're like, “Wait, you spent money to call long distance?” It used to cost 50 cents or a dollar a minute to call long distance. MCI would say, “Well if you get your friends and your family to join MCI as customers, we'll give you 50% off all your calls to everyone who you've gotten to join.” That's kind of why I referred to it as the Friends and Family Plan because it does something nice for you.

Share with me a little bit about those pain points. Specifically, where do nonprofits feel pain with that Friends and Family early board?

Kate Hayes: I think the biggest place where they feel the pain point is that question of when do I begin to shift from that three people (my mom, cousin, friend down the street) who signed the papers to actually investing the time required to build out the board? That does look a little bit different for every organization. And so, that's one of the places that when you're starting to think about, is it time? That's the right time because it feels like there's something off with the

board or something that could be better. But really understanding when that moment in time is really the critical first piece. And the question that I ask them is, why now? And often they'll say, "Well, I need my board to fundraise." I say, "Okay, and what else?" Just purely creating a fundraising board at the earliest stage is not going to be the most effective way to make that shift and make that transition.

Getting clear on the other things and the other ways that a board could actually support the organization in growing and in transforming into a more adolescent, towards mature organization is so critical. So really [get] clear on, why now and what do I want my board to look like? From there, [set] those expectations and [develop] that first board job description, which so often it is easy to kind of just start recruiting and asking friends and family for who else should be on the board. Taking that step back to think about what exactly you need and who exactly you need in order to achieve those goals is really the best way to address that earliest pain point of when's the moment to try to switch.

Dolph Goldenburg: Yeah. I also think that broader recruitment can also be quite challenging for organizations. I hear this all the time from organizations where they will say, "Well, you know, we're small. We've got a \$50,000 budget. We don't have great brand recognition, and we're not the American Cancer Society. You know, we're not a hands-on network or something like a major citywide effort. Our friends and family all know the same people that we know." So, I'm often asked, how do we go about recruiting board members that are not already inside our network?

Kate Hayes: That's where having this job description to start from is so important. One of the biggest challenges that I've continued to observe is that organizations often don't know where to go to find board members. At the same time, prospective board members don't know where to go to find organizations unless they happen to have a friend who's on an organization that has a similar mission that they're interested in. [Shift] that mindset to, how do I spread this as far and wide as possible? Make it almost like a job opportunity. To an extent, it really is. It's one of the most important volunteer jobs at an organization, but creating a process that not only pushes an organization beyond having the immediate network of friends and family, which can often not help with board diversity and getting the right people on board, but can also help find those board members that might not know that an organization is actually looking for board members.

Dolph Goldenburg: How do you feel about identifying prospective board members who you and no one else knows, but doing some cold calls? You've done the research. You know they're interested in the issue, but they don't know you, and you just call them up and say, Hey, can I have a conversation with you about our organization?

Kate Hayes: I think it's great. I hear, because I work both with the early stage boards and with individuals, especially mid-career professionals who are at that point where they still feel like they're not quite ready for board service because they see a board member is looking typically a particular way and being older, which is one of the gaps that we're trying to fill at Echoing Green. When they get that call, they're flattered. They say, "Wow, I hadn't thought of that, but I actually think I could provide a lot of value." I think starting that conversation and starting it early and not

getting into the trap of, I met this great person, I'm going to ask them to join my board tomorrow and starting that cultivation process, getting to know the prospect and the prospect getting to know the organization before even going through the board recruitment pipeline is a really fantastic way to start to find potential board members.

Dolph Goldenburg: What are some other good ways to find those prospective board members? Again, for the non-high-profile small organizations that maybe don't even have any staff yet?

Kate Hayes: There are a lot of places that people don't often even think to post. So ideal is LinkedIn, alumni boards. I think social media is becoming an increasingly good way because you can spread the message far and wide, and you never know who might see a Facebook post and say, oh, I like that mission. The reality is, especially for a lot of these mid-career professionals, there's only 16% of board members are under the age of 40. I think that thirties and forties demographic is a hugely untapped resource for boards, and they might not want to join the board of the American Cancer Society yet; they want an organization where they can develop their leadership skills and really make a deeper impact. That often looks like a younger, less mature organization where they can really get their hands dirty and learn what they need to learn and want to learn as a board member.

Dolph Goldenburg: You know, one of the places that I've had some success in finding board members are employee resource groups sometime called ERGs and sometimes called BRGs, which I think is business resource groups. Have you had much success reaching out to ERGs if the ERGs is aligned with the organization's mission?

Kate Hayes: That's a great place to look. We haven't actually targeted that specifically, so that's a great idea that I'll put into my back pocket and encourage our social entrepreneurs. I do think any place where an organization can find a group of people that are interested in a specific issue... and one of the things that I think is important in looking for board members and for board prospects looking for organizations is to both think about that mission fit, the context of the work that you're joining the mission of but also to think about the content.

One of the things that I coach, prospect of board members on a lot is, what is the right stage of the organization? What am I actually going to be doing? It's one thing to love the mission of an organization. It's another to feel like your skills are aligned with what the board needs at that moment, and that looks very different for an early stage board where it does more so require rolling up sleeves and digging into things in a really deep way versus a much more mature organization. That context and content piece I think is a really critical piece of the puzzle.

Dolph Goldenburg: Let's unpack that for a minute, Kate. So, you're talking to a prospective board member for really early stage organization. Again, no staff, really small, tight budget. You say to them, "Okay, as a board member, you're gonna have to roll up your sleeves and do some work." They reply, "Well, what specifically do you mean by that?" How do you answer that question?

Kate Hayes: You've started to answer that once the organization, even before starting this process has thought about, why now and what do I need from this board? So, let's say they've realized they don't actually know how to or aren't as best equipped as they could be to market the organization and, thus, lead to more fundraising. So, they say, "I absolutely need a marketing or communications professional to help me because I don't have a staff focused on that area." I'm going to specifically look for board members that have that sort of expertise. In the board recruitment process, one of the things that I've find most successful, and I think sometimes people at first glance are a little hesitant, but I think it's important, especially with early stage boards, to have the prospect of board member take on a short-term project.

When they asked that question, then you say, "You know what? I'd want you to really lead the strategy on marketing this organization. As part of this process, spend the next two weeks coming up with a one pager based on what you know because that's actually something that we might ask you to do as a board member. It's a really great way for both us as an organization to get to know you and your working style and for you to get to know us." It's really a two-way process, and both sides have to be really excited and invested in each other to make it a great board fit.

Dolph Goldenburg: Kate, I have to share with you that I love giving prospective board members homework assignments. One of the other things that I do with prospective board members is I've always said prospective board members have to complete a written application. It can be online, but they actually have to go online or write it out and complete an application. Every now and then I'll have early stage boards or even mid and more mature organizations that will push back on that. I say that you want to know upfront if someone's going to flake out, and you want to know that before they're on your board. [Give] them an assignment, and they might say, "Okay, I'll have that to you in three weeks." If four weeks go by, and you don't hear from them, that's what they're going to be like as a board member. In fact, they're going to be worse than that because now they already got what they wanted.

Kate Hayes: I could not agree more, and that's exactly what I say. I get the question, well what if the board member just says they don't want to do the project?" Align with what you said, do you want them on your board if you're at this point of needing board members to put in the work? That's why I, too, think it's such a critical piece and so important.

Dolph Goldenburg: This is true with slightly more mature organizations, but one of the pushback arguments that I will hear... I'll share with you my response to it as well, and I'd love to hear what yours is. One of the pushback arguments I will hear is: If we require that people fill out an application, and if we have an assignment, some of the people we most want on our board (wealthy people who had started businesses) will say, "Oh, that's too much hassle. I'm just not going to follow through. I'm not going to join your board." In Atlanta, the example I always give is Bernie Marcus, who's the founder of Home Depot. They'll say, "Would you require it if Bernie Marcus?" My response is always, "Has Bernie asked to be on your board?" They say, "No, but what if?" I'm like, "Well, when he does, let's talk about that." Until you have someone worth \$1

billion, who comes to you and says, "I want to be on your board," don't worry about it. How do you respond to that? Because I know they've got to say that to you as well.

What happens if so and so says, no, I don't want to do a project. I just want to be on your board?

Kate Hayes: Yeah. I think your response is great. I often say you need to think about whether that profile, for lack of a better term, is somebody that you want on your board because it's going to be a whole different type of work in supporting that very high-profile individual on your board. Like you said, it's probably fairly unlikely that they'll join, and that will be a great problem to solve, if and when it happens. Coming to this, what are you most looking for? [Ground in that], "I'm looking for board members that are going to put in the work and fundraise, and we're gonna support them in that." I think ensuring that each board member is pulling their own weight and that it's an equitable board is much more important. Again, that's a great problem to solve when somebody like that wants to join your board.

Dolph Goldenburg: My follow up on it (and this is very true in my own life when I'm approached about serving on a board) is I will not serve on a board if the board members, before I even get on it, are not meeting the expectations of service, are not doing the work, are not showing up for meetings. I don't want to waste my time being an active board member when there were other board members that are not. I kind of feel like a high-performing board, which means a board full of high performing board members, begets a high-performing board. It's a cycle, and so if you say, "Okay, we only want people on this board, we're going to do the work," you end up with people that do the work and people who join feel a certain sense of peer pressure to keep up with all the other board members that are high-performing.

Kate Hayes: Exactly. I think peer pressure on boards is such a healthy culture to create because it works. I love and encourage all boards, and especially early stage boards, to as early as possible start to build an evaluation methods for the board and tracking things like are people showing up to meetings. Are they coming to this site? When they do show up, are they engaging in healthy debate, or are they disruptive? It's one thing to come to meetings, and it's another to actually show up in a really productive way. By tracking those things, and when comfortable, I push people to share those with the whole board so that they can have that peer accountability. That makes it much easier to let go of a board member or find another place for them if they're not performing in the way that they committed to.

I think that term limits are important, but you don't want them to limit you, especially when you're building that first [non] Friends and Family board and creating those moments and opportunities to have a conversation with a board member if they're not performing well. I think checking in as opposed to just saying, "Hey, you haven't shown up for the past year. What's going on?" but if you haven't shown up for a quarter, "Hey, what's going on?" Often, the person will say, "You know what? Life is getting in the way, and I can't be the type of board member that I want to be." Bless and release. If there's something that they need or something that you could be doing better as an organization to engage your board members, it's also a great learning moment for that.

Dolph Goldenburg: And one of the things that you said that I think is really important for nonprofits of all sizes to understand, and this means the board, the governance committee, the executives, is that serving on the board is not a right. Just because you got on your first term does not guarantee you a second term. Often, you will actually hear governance or nominating committee say, “Well, you know, Joe is not really living up to the expectations, but gosh, they bring some great skills. Why don't we just see if Joe does better in their second term?” Well, you know, people tend not to get better over time if they start off luke warm.

Kate Hayes: Exactly, exactly. I think that's okay giving people the space to say, hey, this isn't working for you or us. I think at the end of the day, volunteers want to be successful in their roles. It doesn't feel good to feel like you're not contributing for most people. I think when you're in a two-term and going into your second term, it can feel like, well, I have to stay. I've made this commitment. Giving that permission that it's okay to let go and sometimes nudging them in that direction if they're not wanting to let go but needing to because they're not showing up as you need to is perfectly okay. That's the only way that we're going to get boards to be higher performing by and large.

Dolph Goldenburg: It's interesting that you use the phrase bless and release, which I love and will definitely be using. Oftentimes I've used the phrase – especially when boards are for the first time setting expectations, and there's all these friends and family members who join the board, not with those expectations – recommit or recuse. So, you know, this is the time. Okay, you understand what the expectations need to be. This is your time to recommit and say, “Yes, I want to be on this board, and I want to meet these expectations,” or you can recuse yourself and say, “I support Joe who started the organization and I really liked the organization, but I'm not up for those expectations.” It's okay for me to step back.

Kate Hayes: Exactly. Exactly that permission piece. It's really powerful in ports.

Dolph Goldenburg: There's one other item that you're an expert on that I want us to talk about today. You are phenomenal at increasing board member's passion for the mission of the organization after they get on the board. I will share with you that I think a lot of organizations, that becomes an issue. Passion peaks somewhere around board entry, and then it's this long, slow or sometimes precipitous drop over the next six to 12 months. Talk to me about what you do to really increase board members passion for the mission.

Kate Hayes: I love talking about this topic. I think that there's a few key things that can be done. The first to remember, especially as an organization, is that passion that was so clear and obvious when somebody joined the board is going to dwindle because they're not actually working at the organization, seeing it day to day. It's so incredibly important to create moments in time for board members to recommit and get more deeply involved in the organization. Often, that can be through a site visit. It can be through connecting them with the stakeholders. It can be just through having conversations. I think it's easy to lump the board into a group that exists, but really spending the time to ask each board member, what is continuing to excite you about this? Let me tell you stories about what's going on.

Giving board members those stories and even better, letting them experience for themselves and create their own stories is the absolute best way to continue to reignite that passion that came up. Along those same lines, one of the things that's important to remember is that (this will tie back into the passion piece) most board members don't go through any training. They don't go through anything that really prepares them for what this sport experience looks like. That cannot create expectations, and then sometimes they feel a little bit stuck. They're not sure if they're providing value, which makes it even more important to provide those opportunities for them just to reconnect and get excited about the organization. So, I can't emphasize site visits enough, and it's not just going on a site visit and sharing all of the great things that are happening with the organization. It's showing your board members what's challenging you. What is your staff thinking about? What's keeping you up at night? I think getting invested in those challenges as well as seeing the opportunities just ignites something in all of us, and we want to continue to get even more deeply involved in what we're doing.

Dolph Goldenburg: Okay. Kate, that's the theoretical. Now, I want the dirty. Tell me a story of an actual organization or an actual board member who was becoming disengaged and, through these techniques of offering experiences, really reengaged and became the board member of the organization needed.

Kate Hayes: Okay, let me think of a great one. So, I'll share an organization that is working in Africa. I know a few of the board members that are in that organization, and they have each been very engaged. There was one particular one that hadn't actually ever visited the site. They loved the mission. They loved what the organization all about, but it was actually very theoretical for them. They hadn't gotten their feet dirty and put their feet on the ground where this organization was working. I happened to be bringing another group of prospects of board members to visit. They came along, and in that moment of experiencing the office environment, going out into the field, connecting with the different stakeholders and staff and seeing and feeling the work that that organization was doing just ignited a passion.

They said, "I have to come back every year to continue to keep this alive and to also see how the organization is growing and evolving." That person is planning their next visit for next year and is continuing to really step up and share stories in a way that the staff are able to share stories board members typically aren't because they [can] say, hey, when I was on the ground and in the field, this is what I experienced. That passion just comes through it in a totally different way after that on the ground experience.

Dolph Goldenburg: So, that probably means that they're maybe doing a little more fundraising as well and more active in board meetings?

Kate Hayes: Absolutely. And I think that that fundraising piece is huge because it's hard to fundraise about the theoretical. It's hard to fundraise when you haven't had that same touch point. I had a board member, a board chair once say that you have to make each board member cry a few times. It's funny, but I think it's also true to an extent that you need to really move them and shift something in their way of thinking and seeing things that is just allowing them to

experience and talk about the organization in another way. That ignites the fire to fundraise and gets that passion going.

Dolph Goldenburg: So, I don't know if this is really going to end up as the title of the episode, but I'm thinking the title of this episode should be Why You Have to Make Board Members Cry with Kate Hayes.

Kate Hayes: I think that's great. You know, I come from a neuroscience background, so I think a lot about human behavior. I think those moments... This is why for the work that I do, these international and domestic site visits are so important. To get somebody so out of their comfort zone... our demographic is often well traveled, but they haven't necessarily experienced social impact on the ground in the way that we facilitate and create those experiences. Just pushing them out of that comfort zone and allowing for the layers to peel back and for them to learn a whole about themselves and with that be able to experience the mission, the passion that really moves them is really powerful.

Dolph Goldenburg: Kate, I could talk to you for like another 45 minutes, but I know you've got stuff for the rest of your day; we batch-record the podcast; we've got some additional recordings later on today. I do, however, have to ask you an Off-the-Map question, and I'd planned a great question for you. I've already thrown that question away because behind you there is a photograph, the top photograph just above your left shoulder. Just so listeners know, Kate and I can see each other. We're Skyping right now, and I like to be able to actually physically see the person I'm talking to. There's a photograph. It looks like it's a woman at a table, and her hands are on something. I have a feeling there's a story about that photograph. What's the story? Who took it? Tell me more.

Kate Hayes: Yes. In all honesty, this is not my office, so not my photo. I believe that this photograph is of one of our organizations. [I am going to] quickly ground a little bit in what Echoing Green does at its core beyond our board leadership programming. We're investing in social entrepreneurs around the world, providing them with seed funding, with support, both leadership and technical from our staff and most importantly, a community of other social entrepreneurs that are at either similar points or further along within this community of 800 incredible leaders across the world. That includes people like Wendy Kopp of Teach for America and Andrew Youn of One Acre Fund. This is one of our organizations that works with artists in India and is working to bring more accessibility into the global marketplace for those very locally focused artists and break down the barriers that come with being able to bring your art to a much broader space globally. I believe actually both of these photos are from the artists of this organization.

Dolph Goldenburg: I love that. I also love the fact that Echoing Green has decorated its walls with mission art. It directly relates to your mission, and that's just really incredible.

Kate Hayes: Absolutely.

Dolph Goldenburg: Well Kate, it has just been so amazing chatting with you today. Thank you so much for coming on the podcast. I want everybody to know that Kate has written some fabulous pieces in Forbes and the Stanford Social Innovation Review, which we will link to in the show notes. You can also find Kate at her nonprofit Echoing Green, which is www.echoinggreen.org.

Hey Kate, thank you so much for being on the podcast. We will at some point have to have you back on to talk about the millennial wave and the nonprofit sector. I know you know a lot about that, and I'm looking forward to a second conversation in the future.

Kate Hayes: I would love that. Thank you so much for having me to, Dolph.

Dolph Goldenburg: If you were too busy hitting up your dry cleaner to serve on your board because you would not listened to this podcast yet, then stop, head back to the office or your home, pull out your phone and check out all the information from today's show at www.successfulnonprofits.com. As I mentioned, you can see some incredible pieces that Kate has written both in Forbes and the Stanford Social Innovation Review, and we will link to that in the show notes as well. Now, a board can really make or break a nonprofit. Ask any executive director who's suffered under the "leadership" of an unresponsive board and you are sure to hear this stories that will certainly make you weep today. We talked about how to make the best board choices from the very beginning, from the nascent stages of your organization, and it is important to review your board to make sure they're still performing a year later and a year after that. Well, why don't we just say it's important every year to review your board.

So, check out my Bonus Break number six, The Four Predictors of Board Performance, which you can also find it www.successfulnonprofits.com. If your board is not hitting those for predictors of performance, well guess what? They might become the four horsemen of the apocalypse at your nonprofit. Your board's got to get those four things right. Finally, dear listeners, now is the time for you to give us a quick review. Please take a moment to rate and review this podcast on iTunes, Stitcher, Google Play, or whatever podcast delivery platform you like to use. That is our show for the week. I hope you have gained some insight to help your nonprofit thrive in a competitive environment.