



Berkeley Board Fellows

2009 – 2010 Nonprofit Board Guide



Haas School of Business, UC Berkeley



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Board Fellows By the Numbers

Fellows/Yr
50+

Nonprofits/Yr
50

Service Hours/Yr
7,000

Estimated Value
\$160,000



Welcome!

Involved. Entrepreneurial. Collaborative. Innovative. These are all defining characteristics of the Berkeley graduate students you are about to meet as part of the Berkeley Board Fellows program. Students in the Haas full-time MBA program come from backgrounds as varied as consulting, financial services, technology, real estate, and consumer products and are seeking opportunities to apply their experience in the nonprofit, for-profit, and government sectors to the challenges and opportunities of your organization's board.

The Berkeley Board Fellows program offers your organization the chance to engage these highly qualified students in a meaningful, substantive role on the board. Despite the fact that a 2006 Deloitte Volunteer IMPACT Survey found that 77% of nonprofit leaders believed they could significantly benefit from volunteers who help them improve their organization's business practices, only 12% of nonprofits actually utilized volunteers in these efforts. The Berkeley Board Fellows program enables your organization to determine how a Fellow's involvement can be leveraged to address board challenges, how such participation can be integrated into the overall organizational strategy, and how to communicate the intent and efficacy of the program to all board members. In turn, you are able to prepare future leaders that can help to shape and build the nonprofit sector.

By joining the Board Fellows program, you will also have the full support of the Haas School of Business Center for Nonprofit and Public Leadership, which prepares leaders with the practical business skills to found, lead, manage, and govern nonprofit and public organizations. The Center provides MBA and other graduate students an opportunity to augment the core business curriculum with specialized coursework, real world field work, and career opportunities in public and nonprofit management. These efforts not only respond to student and employer demand, but also to a changing world in which the distinctions between the public, private, and nonprofit sectors are becoming increasingly blurred.

On behalf of the entire staff of the Center for Nonprofit and Public Leadership at the Haas School of Business, we welcome you to the Berkeley Board Fellows Program.

Sincerely,

Debbie Ng

Debbie Ng

Program Developer, Center for Nonprofit and Public Leadership

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Everybody wins with the Board Fellows program. Non-profit groups like ours benefit from the skills, passion and perspective that these young professionals bring to their Boards. Participating students have an extraordinary opportunity to learn by observing community leaders as they manage organizations at a strategic level. Finally, the community benefits because talented people who are just beginning their careers are inspired to make significant contributions in their lives through non-profit board work.

— David Riemer,
Destiny Arts Board
Member



Program Overview

Founded by Haas MBA students in 2003, Berkeley Board Fellows offers Bay Area nonprofit organizations the opportunity to have a Berkeley graduate student act as a non-voting board member. The goal of the program is to develop students' governance and leadership skills while contributing time and talent to select nonprofit organizations.

The program is managed by Debbie Ng and Nora Silver at the Center for Nonprofit and Public Leadership at the Haas School of Business in conjunction with the two student Vice Presidents of Partnerships from the Berkeley Net Impact organization, who collectively provide training, coaching, mentoring, and recognition for the Board Fellows.

Nonprofit Board Benefits

The Berkeley Board Fellows Program enables nonprofit boards to:

- Gain new skills and a fresh perspective
- Leverage Haas MBAs' innovative skills in marketing, finance, strategy and more
- Learn how to recruit and work with young, professional board members
- Mentor future social sector leaders
- Forge partnerships with UC Berkeley's Haas School of Business

Time Commitment

Nonprofit organizations agree to have a Board Fellow serve as a non-voting member of the board for the nine month period from October through May. The nonprofit board must appoint a board mentor, who should anticipate spending 2 – 4 hours per month outside of board or committee meetings to coach and guide the Fellow as he/she completes a mutually agreed upon project.

Selection and Matching

Nonprofits and students are selected to participate in the Berkeley Board Fellows program through a competitive application process (see selection criteria below). Participating nonprofit organizations represent a range of industries including arts/culture, children/youth, economic development, education, environment, health, and philanthropy. Fellows typically have 5-7 years of professional work experience, come from a range of different backgrounds in both the public and private sectors, and are 1st or 2nd year MBA, MPP, MPH or other graduate level students at U.C. Berkeley.

This was a tremendously valuable experience for our board. Our Fellow provided much needed research and analysis of our situation to jumpstart us and helped to move us in the right direction. We really benefitted from an outside expert.

– Seewan Eng,

Board Chair,
Leadership High
School, Research
Associate,
WestEd



Nonprofit Selection Criteria	
<ul style="list-style-type: none"> ▪ Submission of a thoughtful and complete application ▪ Established Board of Directors, not Advisory Board. ▪ Organizational stability ▪ Organizational buy-in for Board Fellow 	<ul style="list-style-type: none"> ▪ Focus on new leader and board development ▪ Commitment to mentoring a Fellow ▪ Capacity to articulate and support a Board Fellow's role, project scope, and deliverables
Board Fellow Selection Criteria	
<ul style="list-style-type: none"> ▪ Submission of a thoughtful and complete application ▪ Interest in nonprofit and board service ▪ Professional and relevant skills 	<ul style="list-style-type: none"> ▪ Good academic standing ▪ Commitment to the time required ▪ Ability to attend mandatory training ▪ Ability to deliver final report to Center for Nonprofit and Public Leadership

Once the nonprofits and students have been accepted in the program, The Center for Nonprofit and Public Leadership then matches nonprofits and Fellows to align each student's professional skills, industry experience, and personal interests with that of the nonprofit organization and its specific board-related project.

Calendar (2009-2010 At a Glance)

The items listed below are intended to provide a brief look at the major activities and deadlines for the Berkeley Board Fellows program throughout the course of the year.

Application Process	
Nonprofit Board Applications Due	August 28th
Fellow Applications Due	September 14 th
Fellow / Nonprofit Notification	September 30 th

Program Year	
<i>Fall Semester</i>	
Kick-Off Event (Fellows & Orgs)	October 9 th Haas School of Business
Center Check-In	November
Mid-Year Evaluation	December
<i>Spring Semester</i>	
Center Check-Ins	February-April
Final Deliverable to Board/CNPL	May 20
End of Year Evaluation	May 20



Program Expectations

The Berkeley Board Fellows Program offers a nonprofit organization the opportunity to further its own mission and advance the work of the board, while enabling students to acquire knowledge of and experience with nonprofit organizations and board governance.

Nonprofit Organizations

Nonprofits are expected to:

- **Fully integrate the Fellow into the board** by identifying a board member to coach and guide the Fellow; provide a formal introduction to the organization's work, goals, and challenges; and invite the Fellow to all board and committee (as appropriate) meetings.
- **Ensure on-going support for the Fellow** by clearly communicating the role of the Fellow to the members of the board and to the organization's staff.
- **Collaborate with the Fellow to design a specific project** that meets the board's needs, supply any information or contacts necessary for the Fellow to complete the project, and provide feedback at the conclusion of the project.
- **Set outcomes** that can be meaningfully completed by the Board Fellow between October and May that respect the student's academic commitments.

Board Fellows

Board Fellows are expected to:

- **Participate in all board meetings** from October through May and serve on one board committee or task force. (If there is a conflict with a class or other previously scheduled academic event, Fellows should contact the Board Mentor and Center staff to arrange an alternate solution.)
- **Complete an agreed-upon project** that leverages the Fellow's expertise to address a matter of concern to the board and present the final results to the board by May. Attend all mandatory Board Fellows trainings, provide any required feedback, and submit a copy of the final project to the Center for Nonprofit and Public Leadership.

Board Fellows should **NOT**:

- Be a voting member. This protects Fellows from legal and financial liabilities.
- Provide consulting services unrelated to a specific project or committee obligation.
- Engage in office or programmatic support directly tied to the day-to-day operations of the organization. Participation should focus on issues relevant to the board of directors and to the Fellow's particular project; Fellows are not interns.
- Contribute monetary donations or participate in direct fundraising efforts (though assistance with institutional development on a strategic level is appropriate).

Our fellows brought a positive, questioning energy that opened new conversations around board assessment and donor interests. We are very grateful for their sharing of time and talent.

– Phillip Arca,
Executive
Director, Saint
Vincent de Paul



Program Structure

The Berkeley Board Fellows program consists of five primary components:

- **Kick-Off.** The Center for Nonprofit and Public Leadership hosts a kick-off event for all Board Fellows and Nonprofit Board members as a means of welcoming all to the program, introducing the Fellows and the organizations to each other, and enabling the nonprofit organizations to connect with one another.
- **Mentoring.** The nonprofit should select one experienced and established board member to act as a mentor to the Board Fellow. In addition to being the main point of contact for both the Fellow and the Center for Nonprofit and Public Leadership, the Mentor has the opportunity to coach and guide the Fellow through the experience of serving on the board.
- **Board and Committee Participation.** The nonprofit should expect that each Fellow attend all board meetings, schedule permitting. Fellows should also be encouraged to join a committee (e.g. Strategic Planning, Finance, Development, etc.), especially if participation enables the Fellow to better complete his/her project.
- **Projects.** The nonprofit is expected to work with its Fellow to agree upon an individual project that utilizes the student's business, public policy, or other expertise to address an unmet need identified by the Board of Directors. Further details on the projects are provided in a separate section below.
- **Feedback and Monitoring.** Twice a year, the organization must complete a survey for the Center for Nonprofit and Public Leadership to provide feedback. The organization also has ongoing opportunities to check-in with the Center staff as questions or issues arise. In addition, Board Mentors should communicate regularly with their Fellow to ensure that expectations are being met and that the project is proceeding as planned. At the conclusion of the year, Mentors should provide feedback on the final presentation or written report detailing the results of the project submitted by the Fellow.

I am proud that we have this program at Haas. Board Fellows has been fundamentally important to my understanding of how a board functions, as well as to my confidence to serve on a board in the future.

– Liz Rockett,
MBA/MPH 2010,
Board Fellow
with YMCA East
Bay



Program Timeline for Nonprofit Organizations

While this timeline will vary based on how frequently your Board meets, it should give you a good idea of key milestones throughout the Board Fellows program.

August

- Nonprofit boards apply for the Board Fellows program.

September

- Fellows apply for the program
- Organizations and Fellows receive notification

October

- Attend the Berkeley Board Fellows kick-off event at the Haas School of Business, UC Berkeley.
- Set up an initial meeting with your Fellow to help her/him learn more about the organization (board composition, challenges, organizational mission, etc.).
- Introduce the Fellow to other Board members at a board meeting.
- Help identify the type and scope of a project.

November

- Consult with the Fellow to determine an appropriate committee to join.
- Review the Fellow's written project proposal with a defined set of deliverables.
- Check in with the Center for Nonprofit and Public Leadership as needed to discuss Fellow/program questions or concerns.
- Complete a Center for Nonprofit and Public Leadership online survey to share your questions, concerns, and feedback.

February

- Check-in on the progress of your Fellow's project.

March/April

- Discuss the wrap up of the project and final board presentation with the Fellow.
- Check in with the Center for Nonprofit and Public Leadership as needed to discuss Fellow/program questions or concerns.
- Prepare the Board for the departure of the Fellow for the summer. If you are interested in having the Fellow stay on for a second year, talk to the Fellow and inform the Center for Nonprofit and Public Leadership.

May

- Review the final deliverable with your Fellow.
- Complete an end of year online feedback survey for the Center for Nonprofit and Public Leadership.

Thank you for making this connection with a board possible. I learned a great deal about school governance and finance and think it was a valuable experience.

– Mary Ann Bates,
MPP 2010,
Board Fellow



Board Fellow Projects

The Board Fellow project presents an opportunity for the board to address a critical strategic need by leveraging the Fellow's skills, knowledge, and expertise.

Selection

Identifying an appropriate and realistic project is one of the most challenging and potentially rewarding aspects of the program. Each nonprofit organization is asked to identify possible projects based on an assessment of the board's needs, organizational context, previous Board Fellow projects, and upcoming board decisions before a Fellow is matched. After the Fellow is placed, the feasibility of these projects should be weighed based on the Fellow's background and expertise and an appropriate project that can be realistically completed in approximately 9 months should be mutually agreed upon.

Examples of Past Projects

- Board Development: Design a strategy for recruiting next generation board members
- Feasibility Study: Develop a market feasibility study about how to generate revenue based on space rental
- Marketing: Conduct a brand audit
- Implementation Plan: Formulate a plan for creating an alumni association
- Resource Development: Identify and link the organization with community or university resources
- Program Assessment: Assess program's effectiveness at meeting its stated outcomes and impacts
- Strategic Planning: Determine how to best leverage social networking tools

Completion

The project scope should be finalized in October and communicated to the entire board, after which a detailed timeline and set of deliverables should be created by the Fellow. Fellows and board mentors are expected to communicate routinely to ensure that the project is progressing on target and that the Fellow has access to all the resources necessary to complete the project.

Presentation

The Fellow must present the findings from the project by May in whatever format is most appropriate to the board, whether it be an oral presentation, written report, PowerPoint deck, online tool, or other product. A copy of the final project will then be submitted by the Fellow to the Center for Nonprofit and Public Leadership. The project presentation represents the formal conclusion of the Fellow's engagement with the board.



Tips for Success

The following tips are intended to help ensure that the Berkeley Board Fellows experience is productive, rewarding, and enjoyable.

- 1. Share information about the organization.** Encourage the Fellow to take time to prepare and learn about the industry and the organization to help them gain in-depth exposure to nonprofit board service. As appropriate, share the nonprofit's strategic plan, organizational chart, board list, program summaries, and evaluations.
- 2. Set expectations early with your Fellow.** An initial conversation with your Fellow regarding what each party hopes to gain from the experience, how each person works and communicates, what schedules and time commitments should be anticipated, and how logistical details will be addressed will enable you to establish a positive and productive working relationship early in the process.
- 3. Identify a project with clear deliverables and a timeline as soon as possible.** Agreeing upon a project early in the year will allow Fellows to focus their energy and create a clear and compelling role for them on the boards. It will also provide enough time to gather the resources and information necessary.
- 4. Encourage participation.** Although Fellows do not vote, they do offer the board a fresh set of eyes and a different perspective. Encourage the Fellow to participate actively in meetings and contribute their ideas or ask questions.

Best Practices of Nonprofit Board Members

The following are recommendations made to the Fellows as they prepare to serve as board members.

- **Question, Discuss, Debate.** The dynamics of the board are critical for success and rely on respectful dissent and discussion.
- **Focus on big priorities and long-term strategic goals.** Boards are most effective when looking beyond short-term, minute issues.
- **Balance governance with management.** Boards are accountable to the community and the organization and should act as advocates and advisors to staff.
- **Work as a whole.** Boards are successful when the individual board members function as a single entity.

The Stride Center has been benefiting from Berkeley Board Fellows for four years. Each year, our board fellow brings a high level of experience and wisdom to our board and the projects they've completed have been extremely useful to our organization. Every nonprofit I know would benefit from hosting a Berkeley Board Fellow.

– Barry Hathaway, Executive Director, The Stride Center



Resources

The following board-related resources can help nonprofit boards best engage and utilize their Fellows.

The Center for Nonprofit and Public Leadership

Through academic coursework, speaker series, field work, special events, and career opportunities and advising, The Center for Nonprofit and Public Leadership prepares leaders with the practical business skills to found, lead, manage, and govern nonprofit and public organizations for the public good. The Center staff has extensive expertise in working with and for nonprofit organizations and will be available to address your comments and concerns throughout the duration of the program.

Online Resources

- <http://www.boardcafe.org>. This site offers access to a free electronic newsletter from CompassPoint Nonprofit Services for members of nonprofit boards.
- <http://www.boardsource.org>. BoardSource offers a FAQ center about nonprofit boards as well as helpful keyword searches such as “new board members”.
- <http://www.bridgespan.org>. The Bridgespan Group’s website contains a library of articles, videos, podcasts, presentations, and case studies on the nonprofit sector.
- <http://www.compasspoint.org/boardbasics>. This site gives individuals a new and interesting way to explore and learn what it means to serve on a nonprofit board.
- <http://www.eriskcenter.org>. This site contains information and publications to help nonprofit organizations manage risks effectively.
- <http://www.fdncenter.org>. The Foundation Center site contains a directory of private philanthropic and grantmaking foundations.
- <http://www.guidestar.org>. Form 990s (annual reporting returns with information on the organization's mission, programs, and finances) are published here along with other information about nonprofits, including budgets, activities, and salaries.
- <http://www.irs.gov/charities/>. The official IRS site includes rules and guides (such as “A Charity Guide to Car Donations”) and forms to download and fill out (such as Form 990) relevant for nonprofits.
- <http://www.niac.org>. The Nonprofits’ Insurance Alliance of California’s (NIAC) website provides information about insurance coverage.

Questions

For additional information, please contact:

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[Board Fellows] is a great opportunity for a grad student. I was able to provide an outside set of eyes and contributed to various projects. My mentor was strong and available.

— 2008 Board Fellow