



# **Berkeley Board Fellows**

## **2009 – 2010 Fellow Guide**



Haas School of Business, UC Berkeley



## Table of Contents

Welcome!.....	3
Program Overview .....	4
Fellow Benefits.....	4
Time Commitment .....	4
Selection and Matching .....	4
Calendar (At a Glance) .....	5
Program Expectations .....	6
Board Fellows.....	6
Nonprofit Organizations .....	6
Program Structure .....	7
Program Timeline for Fellows .....	8
Board Fellow Projects .....	9
Selection.....	9
Completion.....	9
Presentation.....	9
Tips for Success .....	10
Resources .....	11
Mentoring .....	11
Berkeley Board Fellows Google Group .....	11
Online Resources .....	11
Questions .....	12
2008 – 2009 Berkeley Board Fellows Organizations.....	12

## Welcome!

*Passion. Challenge. Diversity. Support. Responsibility.* These are all defining features of the nonprofit sector that you are about to delve in to as part of the Berkeley Board Fellows program. The approximately one in fifteen Americans who are employed by the six percent of U.S. organizations classified as nonprofit organizations experience these benefits of working within the nonprofit sector. They are surrounded by people who are passionate about what they do and bring with them a wide range of experience and interests. They rise to the challenge of balancing social impact with a financial bottom line and simultaneously meeting the needs of their donors and the recipients of their services. They work in a demanding, yet supportive environment that offers significant responsibility and exposure to high level leaders across sectors early in their careers.

Approximately 1.5 million organizations in the U.S. are classified as nonprofit organizations. These can be privately controlled charitable or philanthropic organizations (501(c)3) such as direct service providers or corporate and community foundations or they can be political advocacy organizations that do not offer any direct services (501(c)4). Such organizations typically are grouped in to one of the following sub-sectors: Arts & Culture, Community Development, Education, Environment, Foundations, Health Care, International Aid and Economic Development, and Social Services.

*So where do you fit in?* Most business leaders today serve on at least one nonprofit board or in a position of community leadership. Berkeley Board Fellows offers students the opportunity to participate as a non-voting board member for a local nonprofit organization. The program offers a glimpse into a sector that is looking for leaders who are adaptable, empowering, and committed and that increasingly has a need for and an interest in the skills, talents, and ambitions that MBA graduates have to offer. This is your opportunity to diversify your past experience, apply the principles you have been learning in real world settings, and contribute to the issues for which you are most passionate.

We welcome you to the Berkeley Board Fellows Program.

Sincerely,  
*Debbie Ng*

Debbie Ng  
Program Developer, Center for Nonprofit and Public Leadership  
Haas School of Business  
University of California, Berkeley  
T: 510-643-1869  
E: [dng@haas.berkeley.edu](mailto:dng@haas.berkeley.edu)

### Board Fellows By the Numbers

Fellows/Yr  
**50+**

Nonprofits/Yr  
**50**

Service Hours/Yr  
**7,000**

Estimated Value  
**\$160,000**

*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 Berkeley graduate students the opportunity to participate as a non-voting board member for a Bay Area nonprofit organization. The goal of the program is to develop students' governance and leadership skills while contributing their 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 Vice Presidents of Partnerships from the Berkeley Net Impact organization, who collectively provide training, coaching, mentoring, and recognition for the Board Fellows. Students seeking additional preparation for board leadership are encouraged to pursue a one-unit course on Nonprofit Boards offered in the fall semester.

## Fellow Benefits

The Berkeley Board Fellows Program enables students to:

- Obtain an invaluable leadership experience
- Actively engage with and contribute to the local community
- Gain insight into the challenge of governing an organization for social change
- Develop relationships with business and community leaders
- Count service hours towards the MBAA Community Fellow Program

## Time Commitment

Board Fellows agree to serve on the board of a nonprofit organization for a nine month period from October through May. Fellows should anticipate spending 8 – 10 hours per month attending board and committee meetings and working on a mutually agreed upon project. While Fellows are expected to attend all scheduled board meetings, they are discouraged from missing class to do so. Placements will be made taking fall schedules into consideration; conflicts arising in the spring must be clearly communicated to the board so that arrangements can be made for briefings on board meetings, committee attendance, and other updates.

## 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). Students can specify industry preferences for nonprofit organizations representing a range of areas 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 1<sup>st</sup> or 2<sup>nd</sup> year MBA, MPP, MPH or other graduate students at Berkeley.



**Board Fellow Selection Criteria**

- Submission of a thoughtful and complete application
- Interest in nonprofit and board service
- Professional and relevant skills
- Good academic standing
- Commitment to the time required
- Ability to attend mandatory training
- Ability to deliver final report to Center

**Nonprofit Selection Criteria**

- Submission of a thoughtful and complete application
- Established Board of Directors, not Advisory Board.
- Organizational stability
- Organizational buy-in for Board Fellow
- 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

Once the students and nonprofits have been accepted into the program, The Center for Nonprofit and Public Leadership then matches Fellows and nonprofits 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 (At a Glance)**

Opportunities for check-ins with the Center for Nonprofit and Public Leadership as well as small group dinners with experienced board members will also be available during the year.

Application Process	
<b>Fellow Information Sessions</b>	September 9 <sup>th</sup>
<b>Fellow Applications Due</b>	September 14 <sup>th</sup>
<b>Fellow / Nonprofit Notification</b>	September 30 <sup>th</sup>

Program Year	
<i>Fall Semester</i>	
<b>Kick-Off Event (Fellows &amp; Orgs)</b>	October 9 <sup>th</sup>
<b>Fellows Training (1)</b>	October TBD
<b>MBA 292B Nonprofit Boards (1)*</b>	October 31 <sup>st</sup>
<b>MBA 292B Nonprofit Boards (2)*</b>	November 21 <sup>st</sup>
<i>Spring Semester</i>	
<b>Fellows Training (2)</b>	February TBD
<b>Fellows Workshops*</b>	March/April
<b>Final Deliverable to Board/CNPL</b>	May 20 <sup>th</sup>

\* Enrollment in MBA 292B and attendance at the Workshops are optional for Fellows.

*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



## Program Expectations

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

## 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 directed 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).

## 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.

*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

In addition to kick-off and closing events, the Berkeley Board Fellows program consists of five primary components:

- **Training.** All Board Fellows will be required to attend two mandatory training sessions, one at the outset of the fall semester and one early in the spring semester. The purpose of the initial training is to orient the Fellows to the program, to set expectations for what the board experience will be like, to offer guidance in selecting an appropriate project, and to provide an overview of the nonprofit sector and the typical board structure, governance, and objectives. The intent of the second training is to provide practical tools and resources as they apply to the particular organizations within the program and to foster collaboration and exchange of best practices amongst the Fellows.
- **Mentoring.** In addition to training at the group level, opportunities for individual mentoring to address organization specific issues will be available to Fellows throughout the year from the Center for Nonprofit and Public Leadership as well as from former Board Fellows and Haas alumni.
- **Board and Committee Participation.** Each Fellow is expected to attend all board meetings, schedule permitting. Fellows are also encouraged to join a specific committee (e.g. Strategic Planning, Finance, Development, Marketing, etc.), especially if participation enables the Fellow to better complete his/her project.
- **Projects.** Each Board Fellow is required to complete an individual project mutually designed and agreed upon by both the Fellow and the nonprofit. The project should utilize 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.** At the conclusion of the year, each Fellow must complete a presentation or submit a written report to the nonprofit detailing the results of the project. Fellows must also submit a copy of this final presentation or report to the Center for Nonprofit and Public Leadership and complete an end-of-year survey. In addition, on an on-going basis, Fellows are also advised to communicate regularly with their primary board contact to ensure that expectations are being met and that the project is proceeding as planned as well as with Center staff as needed for mentoring or resource purposes.

*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 Fellows

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

### September

- Attend an information session to learn more about the Board Fellows Program.
- Apply for the Board Fellows program and receive notification and placement.

### October

- Attend the first Board Fellows training and kick-off event.
- Research your organization and then contact them to introduce yourself.
- Set up an initial meeting with your Board Mentor to learn more about the organization (Board composition, challenges, organizational mission, etc.).
- Attend your first Board meeting and get acquainted with the Board members.
- Identify the scope of your project based on your skills and Board needs.
- Participate in a check-in meeting with CNPL to assist in project scoping.

### November

- Select a committee to join in consultation with your Board Mentor.
- Draft a project proposal with a defined set of deliverables.
- Attend a small group dinner hosted by the Center.

### December

- Complete an online survey to share your questions, concerns, and feedback.

### February

- Attend the second Board Fellows training during the 1<sup>st</sup> week of February.
- Discuss the progress of your project with your Board Mentor.

### March

- Check-in with the Center as needed for guidance or resources for your project.

### April

- Wrap up the project upon which you have been working.
- Attend a small group dinner hosted by the Center.
- Inform the Board that you will be leaving. If you are interested in staying on for a second year, talk to the Board and to the Center.

### May

- Present your final deliverable to your board and email a copy to Debbie Ng.
- Complete an online feedback survey for the Center.

*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

Each Board Fellow is also required to complete a project during the nine month fellowship. The project is intended to allow the Fellow to leverage his/her own skills and knowledge to gain specific expertise on at least one aspect of the nonprofit while addressing a critical need of the board.

### Selection

Identifying an appropriate and realistic project is one of the most challenging and potentially rewarding aspects of the program. Each nonprofit organization will be 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 realistically be completed in approximately 9 months should be mutually agreed upon.

Examples of Past Projects	
<ul style="list-style-type: none"> <li>▪ <b>Board Development:</b> Design a strategy for recruiting next generation board members</li> <li>▪ <b>Feasibility Study:</b> Develop a market feasibility study about how to generate revenue based on space rental</li> <li>▪ <b>Marketing:</b> Conduct a brand audit</li> <li>▪ <b>Implementation Plan:</b> Formulate a plan for creating an alumni association</li> </ul>	<ul style="list-style-type: none"> <li>▪ <b>Resource Development:</b> Identify and link the organization with community or university resources</li> <li>▪ <b>Program Assessment:</b> Assess program’s effectiveness at meeting its stated outcomes and impacts</li> <li>▪ <b>Strategic Planning:</b> Determine how to best leverage social networking tools</li> </ul>

### 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. During the nine months, 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. Additional guidance and resources can also be sought from the Center for Nonprofit and Public Leadership or previous Board Fellows as needed.

### Presentation

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

*Our Board Fellow’s project was to create a presentation on health disparities and resiliency factors relating to our mission. This presentation has framed our key messages in ways we haven’t been able to capture in years!*

– Barbara Bunn McCullough, Ph.D., Executive Director, Brighter Beginnings

## Tips for Success

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

1. **Immerse yourself in the organization.** From the moment you find out your placement, gather all the information you can on the organization, whether it be by researching online or speaking to past Board Fellows. Once you join the board, take time to learn about the industry and the organization by attending activities hosted by the organization or shadowing staff or board members “in the field”. Ask to see the nonprofit’s strategic plan, organizational chart, board list, program summaries, and evaluations. Consistently attend board and committee meetings and engage with other board members to gain in-depth exposure to nonprofit board service.
2. **Set expectations early with your mentor.** An initial conversation with your board mentor 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 you to focus your energy and create a clear and compelling role for you on the board. It will also provide you with enough time to gather the resources and information necessary.
4. **Get Involved.** Although Fellows do not vote, they do have influence. Fellows offer the board a fresh set of eyes and a different perspective. Feel free to participate actively in meetings and contribute your ideas or ask questions. Chances are others will share your same questions.

### Best Practices of Nonprofit Board Members

- **Question, Discuss, Debate.** The dynamics of the board are critical for success and rely on respectful dissention and discussion.
- **Focus on big priorities and long-term strategic goals.** Boards are most effective when looking beyond short-term, trivial 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 are off and online resources that can help Fellows better understand the opportunities and challenges facing their nonprofit boards and how best to handle them.

## Mentoring

There are multiple opportunities for Fellows to seek out mentoring during the program.

- The **Board Mentor** should be an established and experienced board member with heightened familiarity with the organization who regularly attends board meetings. The board mentor can help guide the Board Fellow through his or her participation on the board, act as a resource for questions about the organization; and educate the Board Fellow about board service.
- The **Center for Nonprofit and Public Leadership** offers academic coursework, speaker series, field work, special events, and career opportunities to prepare leaders with the practical business skills to found, lead, manage, and govern nonprofit and public organizations. Nora Silver and Debbie Ng are available to provide background materials and resources on thematic issues; help to identify an appropriate project scope, timeline, and deliverables; and serve as a liaison between the Fellow and the nonprofit in extenuating circumstances.
- **Former Board Fellow or Alumni** are familiar with the Board Fellows program, the nonprofit organization itself, and/or the specific industry in which the nonprofit operates. These mentors can advise Fellows on effective engagement and communication tactics, offer insights and expertise into industry specific practices, and provide continuity between Fellows from one year to the next.

## Berkeley Board Fellows Google Group

The Google Group is a way for Fellows to pose questions and solicit the advice of other current Fellows. It also serves as a communication tool and information repository for the Center for Nonprofit and Public Leadership to reach out to the Fellows.

## 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.

*[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

- <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:

Debbie Ng, Program Developer

T: 510-643-1869

E: [dng@haas.berkeley.edu](mailto:dng@haas.berkeley.edu)

<http://nonprofit.haas.berkeley.edu>

## 2008 – 2009 Berkeley Board Fellows Organizations

Agape Foundation	Larkin Street Youth Services
Alameda County Foster Youth Alliance	Leadership High School
Alameda Point Collaborative	Make-A-Wish Foundation
Aspiranet	Marin Theatre Company
BAHIA Bay Area Institute for Advancement, Inc.	McCullum Youth Court
Bay Area Coalition of Essential Schools	Mission Neighborhood Centers
California CASA	Native American Health Center
Commonwealth Club	Oakland Interfaith Gospel Choir
Community Educational Services	Planned Parenthood
Contra Costa Crisis Center	Real Options for City Kids (ROCK)
Destiny Arts	Rebuilding Together
Family Emergency Shelter Coalition	Saint Vincent de Paul
FoolsFury Theater	Seeds of Learning
Friends of SF Independent Living Skills	SF Chamber Orchestra
Giants Community Fund	SPARK
Golden Gate National Parks	Stride Center
Conservancy	Swords to Ploughshares
Hanna Boys Center	The Land Trust of Napa County
Housing Consortium of the East Bay	United Way of the Bay Area
Instituto Familiar de la Raza	Variety Children's Charity of Northern CA
John Muir Health Foundation	Women's Daytime Drop-in Center
	YMCA East Bay

*I'll be on the  
board myself  
next year -  
they've  
appointed me  
for a two-year  
term.*

— 2008 Board  
Fellow