

21ST ANNUAL

**BRIDGE TO INTEGRATED
MARKETING & FUNDRAISING
CONFERENCE**



**STRONGER
THAN THE
MOMENT**

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Create a Fired-Up, High Performing Board!



Gail Perry
Founder, MBA, CFRE
Gail Perry Group

Sponsored By:





CREATE A FIRED-UP, HIGH PERFORMING BOARD!

Energy, Alignment, and Action

Gail Perry, MBA, CFRE

GAIL PERRY, MBA, CFRE



- **30+ Years Guiding Nonprofit Boards**
- **Founder, Gail Perry Group**
- **Helped Organizations Raise Over \$1 Billion**
- **Author, Fired-Up Fundraising**
- **Top 20 Fundraising Expert | LinkedIn Top Voice**

TODAY, LET'S...



**Create a board that's inspired,
engaged, ready to act**



**Build real buy-in from your board
and your CEO**



**Get action tools to build a purpose-
driven team**



**Discover how to shift your board's
culture — passive to proactive**



**Create inspirational, productive
board meetings**



**Give your board members a great
experience**



**Our Dream: A purpose-driven team.
Leads boldly. Everyone is flying like geese!**

OUR REALITY: WHERE ARE WE TODAY?



Where does your board fall on this line?

EXERCISE – quick self-rating

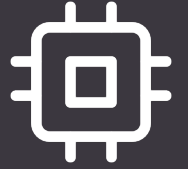
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THOUGHT FOR THE DAY:

Culture eats strategy for breakfast.

— *Peter Drucker*



CHANGE YOUR PERSPECTIVE

No problem can be solved from the same level of consciousness that created it.

— *Albert Einstein*

OUR FRAMEWORK FOR TODAY

Understand CULTURE



CREATE ENERGY

Unwritten customs and habits

Deploy STRUCTURE



**CREATE
ALIGNMENT**

The tools that create change



EXERCISE

What is Culture? And How Does It Show Up on the Board?

Ask the room – collect live



EXERCISE

What is Structure? What Types of Structure Do We Have to Work With?

Ask the room – collect live

CULTURE: THE LENS



Behavior



Group Process



Psychology

Unwritten customs, habits, informal alliances.

WHAT IMPACTS CULTURE (1/2)



Be Aware of Group Process

Where are the informal alliances on your board? Where is the unspoken power? Who is listened to and who is ignored? What's going on in the room?



The Experience Board Members Are Having

What kind of experience are you giving your board members? Is it interesting? Or is it a one-way information stream?



Engaging Interesting Meetings

The meeting is the principal point of contact between a board member and your organization. What are board meetings for? What is the board for? What do you want the board to come away with? Boring meetings breed disengagement.

WHAT IMPACTS CULTURE (2/2)



Inspire Them. Awaken Their Passion and Energy

Meet people where they are.

Ask them why they joined the board.

Let them talk. Talking can open up the heart – and lead to action.

Look at them as a team and create a team spirit.



Leadership Willing to Change the Status Quo

Someone has to say, let's try this; let's do something different.

The pull of the status quo is strong!

My Story:



What Happened When I Asked After Chairing the Meeting,

“How Did We Do?”

THE FIVE DYSFUNCTIONS VS. HIGH-PERFORMING TEAMS

FIVE DYSFUNCTIONS

- Absence of Trust
- Fear of Conflict
- Lack of Commitment
- Avoidance of Accountability
- Inattention to Results

WHAT A HIGH-PERFORMING TEAM NEEDS

- Trust & Collegiality
- Build Personal Relationships Among Board Members
- Expectations Openly Discussed
- Accountability
- Clear Roles



Peer Pressure: Your Best Motivator
People follow people.

RESEARCH: WHAT BOARD MEMBERS ACTUALLY WANT



Their time used wisely.



Work with people as passionate as they are.



Meet the other board members.



Giving tracks with how much they enjoy it.



Real work. Not just opinions.



*The #1 reason people join?
Who else is on the board.*



**Mingle Exercise: To Awaken New Energy
“Why Do You Care About Our Mission?”**

PERSONAL CHANGES CAN SET THE TONE



Be the Spark Plug



**Model the Energy
You Want**



Lighten Up

”



I can't change them. But I can change me.

— Laurie Taylor, Lower Cape Fear Hospice Foundation

12 WAYS TO LIVEN UP YOUR BOARD MEETINGS

Give Your Board Members a Great Experience

1

Restructure the Agenda With Intention

2

Set Clear Goals for the Board to Accomplish

3

Focus on Results: What Did We Accomplish?

4

Make the Numbers Interesting: Discuss Trends Over Time

5

Focus on Strategic Challenges, Broad Issues, SWOT Issues

6

Cut Back on Meetings Full of Reports – They Can Be Mind-Numbing

12 WAYS TO LIVEN UP YOUR BOARD MEETINGS (CONT.)

7 Create Discussion Opportunities for Members to Offer Input

9 Plan to Include One Substantive Discussion Item

11 Limit Committee Report Time to Make Room for More Interesting Items

8 Create an Informal Interview With the Executive Director

10 Select a Theme for Each Meeting

12 Break Into Small Groups for Discussions





STRUCTURE

Your Change Agent Tools

WHAT STRUCTURE ACTUALLY COVERS



Orientation



Committee Structure



Meeting Structure; Agendas



Bylaws



Clear Roles and Responsibilities



Clear Written Expectations



**Board Member Activity or Report
Cards**

CLARIFY ROLES & EXPECTATIONS



What is – and isn't – their role.

Clear expectations make everyone happier and more productive.

BUILD BUY-IN FROM BOARD AND CEO



Build it with them, not announce it to them.



Clarify roles first.



Lead with why, not what.



CEO + Board Chair present it together.

TWO KEY CHANGE AGENTS



Governance Committee



Annual Self-Assessment

GOVERNANCE COMMITTEE: YOUR CHANGE AGENT (1/2)



Establish Clear Expectations

Discuss them often and openly



Evaluate Board Meetings

The post-meeting "How did we do?" check



Enforce Compliance With Bylaws, Including Term Limits

Don't let your board become a social club



Personally Welcome Every New Member

Make orientation a process; include social time



GOVERNANCE COMMITTEE: YOUR CHANGE AGENT (2/2)



Manage Continuing Education

Help board members learn more outside meetings — let them choose the topics



Check In on Board Member Experience

Watch for "board member malaise"; ensure enough social time to foster working relationships



Guardian of the Board's Group Process & Culture

How are we doing? Is everyone engaged?



ANNUAL SELF-ASSESSMENT: GIVE IT TEETH

Feedback with nowhere to go falls flat.

Assign a Task Force to review results and recommend real change.



TERM LIMITS

Without them, boards calcify.

Term limits bring in fresh voices.



EXERCISE

TAKEAWAYS!

What Are Your Action Items or Next Steps?

Let's hear one from everyone!

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It was such a thrill to see the body language and faces of our board members change from reservation, reluctance, and uncertainty to smiles, laughs and excitement.

— Abby Johnston, Director of Development, Saint Mary's School, NC

HANDOUTS & RESOURCES



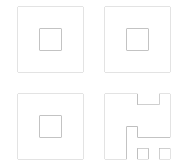
Governance Committee Checklist

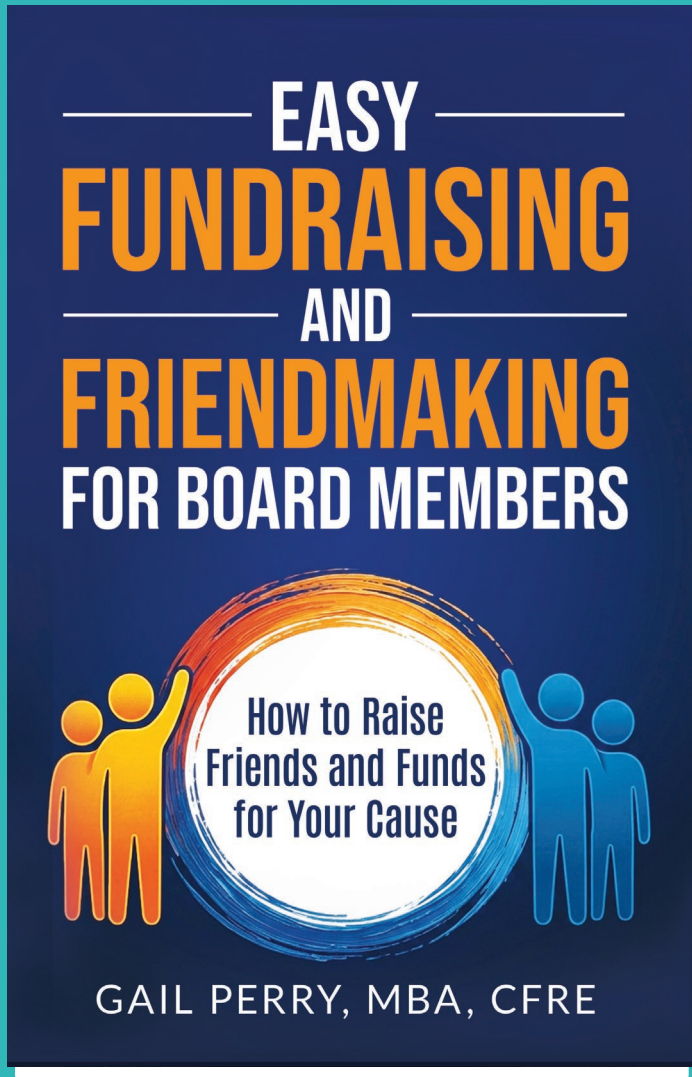


12 Ways to Liven Up Your Board Meetings



Find both at: Bridge Conference Resources





NEW BOOK!

Easy Fundraising & Friendmaking for Board Members

Practical, joyful tools to help board members build relationships and raise more – coming this fall.



Want to Create a More Effective Board?

Reach out for workshops, coaching, board retreats

Or if you just want to talk and have a question!

Gp@gailperry.com

Thank you!

Energy. Alignment. Action.

Now go create it.

