



OCATO Spotlight

Do You Know What it Takes to be a Effective Board Member? Here are Six Tips from Julia Wise:

Julia Wise, executive director for Highland County Community Action Organization is an Internal Consultant for the Ohio Community Action Training Organization (OCATO). She has been with HCCAO for over 20 years and teaches Strategic Planning, Board Training, Outcomes, ROMA and Fiscal Controls as an IC for OCATO. Below she's shared six tips for board members that she has gained from both her experience as an executive director and the OCATO trainings.

Serving on the board of directors for a Community Action Agency can be very fulfilling, but also much more extensive and intensive than serving on another nonprofit board. Community Action Agencies operate various programs with numerous funding sources. Each program has different rules, different income guidelines and different audits. Additionally, most Community Action Agencies are also now looking at ways to raise funds to help supplement the decline in grant dollars and increased customers. Being a board member is not simply an hour meeting a month and walking out the door. Here are some helpful tips for being an effective board member:

- **Be informed.** Don't be afraid to ask questions and ask for more information. As an executive director, I like when the board engages in discussions with me, my staff and other board members at board meetings. It means they are not simply a "YES" board. We work hard all month long and love to share our accomplishments.
- **Be sure to talk to the agency-wide auditor** to find out from their perspective how things are going. A single agency-wide audit is generally held once a year. All board members will receive a report. They should also have the opportunity to talk privately with the auditor.



- **Be willing to help beyond the monthly meeting.** There will be committee meetings to attend and special events. How about visiting a Head Start center and reading to the children? How about going to the Senior Nutrition site and eating a meal? How about volunteering at the fair booth, festival booth or other activities that are held to raise community awareness? It is important to see the programs in action so you can understand what is being talked about at a board meeting.

- **Be willing to make a donation or assist with fundraising.** Financial contributions are always nice and tax-deductible. Even the smallest donations help, but in these difficult economic times, that may not always be possible. However you can volunteer to help lead or assist with a fundraising event—golf outing, gala, pancake supper—we all have those hidden skills that can be utilized.
- **Have a Succession Plan!** Many executive directors in Ohio look to retire in the next five years; however, you may be with an agency that has a young, bright, enthusiastic leader who appears they may be a "lifer." Why would you need a succession plan? Lots of things could happen, and some we won't mention; however, what would happen if the executive director's spouse or family had to move away for an unexpected reason, if there was a long term illness or they won the lottery... the list goes on. This planning should take place with the executive director on an ongoing basis. Who would take over internally if the executive director had to be off for awhile? Who are they training or would they recommend to step-in? The same goes for board



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members. Many boards have term limits. There are pros and cons to term limits; however, as a board member you should always be on the lookout for other leaders who could compliment the board if someone leaves. Think about what skill sets you're missing.

- **Attend meetings.** Action cannot be taken on items if there is not a quorum present. Grants have deadlines for submissions. We need board members to attend meetings and, if they cannot, to notify the executive director as soon as they know that they won't be there.



Smile and be Proud! As a board member of a Community Action Agency you get to help people and change lives every day. Every CAA is required to have a board. Feel privileged and proud that you can help make a difference!

OCATO will be offering a board training this fall. Be sure to keep a look out so you can learn more great tips!