

# BOARD LEADERSHIP COURSE

distributed by **SLINGSHOT**

## OBJECTIVES

We aim to meet the following objectives over the arc of the course:

- Empower participants to serve as leaders in the nonprofit community;
- Give participants the tools they need to clarify their motivational values and the institutional values they will look for in the organizations they serve;
- Acquire the skills and know how to be an effective board member;
- Learn about participants' unique opportunity as next gen board members to lead;
- Develop a peer group of next generation funders who are going through a similar experience and process.



PJSF



21/64

## BACKGROUND

Nonprofit board participation is a big responsibility, especially in this environment. Individuals joining boards for the first time can feel unprepared to adopt the role of board member with confidence. To this end, the Paul and Jenna Segal Foundation (PJSF) founded a course, developed by 21/64, that aims to equip the next generation with the skills and know-how to be successful board members. Together with PJSF and 21/64, Slingshot is presenting this learning opportunity to empower and mobilize young philanthropists in the Jewish World.

The course is a fusion of experiential learning and purposeful skill building, designed to cultivate the next generation of board members who are well informed and trained to take on the role of board member effectively in this moment. This course will layer on a critically important generational lens and allow next gen participants to find their voice and learn about their unique opportunity to lead.

## PURPOSE

The purpose of the course is to equip Millennials and Gen Xers, who are preparing to serve or currently serving on a nonprofit board, with the concrete knowledge and practical application they will need to serve as board members and harness their unique opportunity as Next Gen donors to lead.

Graduates of this course will be invited to participate in Slingshot's board matching program designed to connect trained Next Gen donors to board leadership opportunities.

## PROCESS

This course will take place remotely over six sessions with ongoing opportunities to learn together.

**SUNDAY, AUG 9**; 2-5pm EST

**TUESDAY, AUG 11**; 4-5:30pm EST

**THURSDAY, AUG 13**; 12-1:30pm EST

**TUESDAY, AUG 18**; 4-5:30pm EST

**THURSDAY, AUG 20**; 12-1:30pm EST

**SUNDAY, AUG 23**; 2-5pm EST

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## **AGENDA** *The following are selected excerpts from the course agenda:*

### **Determining and Articulating the Organization's Mission, Vision, and Values**

How will you support the organization's efforts to determine and articulate the values and vision of the organization?

### **Strategic Planning**

How do boards build and lead effective planning processes, and what is the unique lens that next gen board members can bring to this process? In this module, we will hear from experienced strategic planning professionals on the nonprofit strategic planning process, and the role board members play.

### **Fundraising**

What will your fundraising responsibilities be as board member? In a moderated conversation with an experienced board member, we will cover topics ranging from annual fundraising goals to donor recognition policies and cultivation, solicitation, & stewardship.

### **Financial Oversight**

What will your financial responsibilities be as board members? In this session we will educate on the fundamentals of organizational finance as they relate to board governance. An expert in nonprofit organizational finance will shed light on the board's financial responsibilities, including reading and assessing key financial documents, and share best practices.

### **Hiring, Overseeing and Evaluating the Executive Director**

One of the most important jobs of a board member is the hiring of the executive director. Some might say getting this right determines everything else. In this module we will bring in experts from executive search firms who will share best practices for hiring and overseeing the executive director.

### **Fiduciary, Ethical and Legal Responsibilities**

In this module, we will identify and understand the key legal and ethical responsibilities of nonprofit board members in a practical way. By posing a series of legal and ethical case studies, all rooted in real events and similar to what you may face as board members, we will use active learning and discussion to demonstrate that the practice of fiduciary responsibility is not as clear cut (or as dry) as it sounds.

### **Ambassadorship**

We heard in our research from Next Gen donors that they focus on four primary resources they contribute to make a difference in the world. Given everything you learned in today, what are the resources you want to bring to bear as a board member moving change forward? We'll be sure to help you make a plan for next steps to make your plan actionable in the year ahead.

