

Synagogue Series  
Governance  
October 14, 2020  
Nanette Fridman



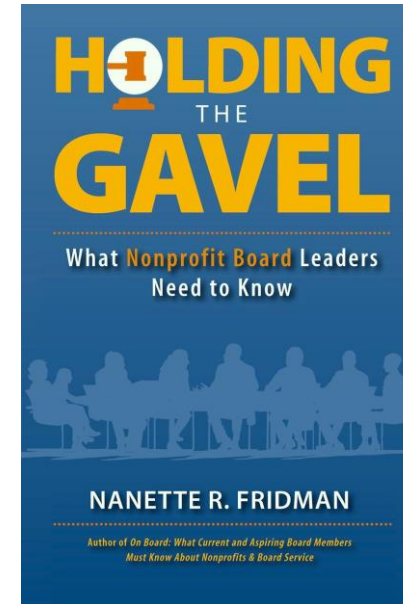
F R I D M A N  
STRATEGIES

# In the Chat

- Your Name
- Your Synagogue
- Your Role
- One Word that Describes Your High Holiday Experience

# Introduction of Nanette Fridman

- President of Fridman Strategies, Inc.
- 25+ years of experience with nonprofits as a professional, lay leader, consultant & coach
- National speaker, trainer and facilitator
- Author of two books, *On Board* and *Holding the Gavel*
- BA, Tufts University
- MPP, Georgetown University Public Policy Institute
- JD, Georgetown University Law Center
- Harry S. Truman Scholar



The book cover for 'ON BOARD' has a white background. At the top, there is a quote in small black text: "If you've just been asked to join your first board or you're on ten boards, Nanette Fridman has written the book for you. On Board tells you everything you need, from A to Z and then some—and it's so readable!" followed by the name 'Peter Ledman, Professor of Law, Georgetown University Law Center'. The title 'ON BOARD' is in large, dark blue, serif font. Below it, the subtitle 'WHAT CURRENT AND ASPIRING BOARD MEMBERS MUST KNOW ABOUT NONPROFITS &amp; BOARD SERVICE' is written in smaller, dark blue, sans-serif font. At the bottom, the author's name 'NANETTE R. FRIDMAN' is printed in dark blue, with 'Foreword by Aaron Philip Dworkin, President, After-School All-Stars National Network' in smaller dark blue text below it. A silhouette of a group of people sitting around a table is visible in the background.

**NANETTE R. FRIDMAN**  
Foreword by Aaron Philip Dworkin  
President, After-School All-Stars National Network

# Agenda

- Welcome – Kimberlee Schumacher, VP Partnerships & Services at CJP
- Presentation – Nanette Fridman, Facilitator
- Q&A
- Breakout Rooms ~11:30 pm
  - Continued Governance Q&A with Nanette
  - Networking/Learning from Colleagues and Getting to Know Each Other with Andrew Kastner, VP of Jewish Life at CJP
- Concluding Remarks & Post-Event Survey – Kimberlee



## Goals for this Session

1. Discuss how to create an intentional pipeline and the process for recruiting board members.
2. Share ideas for developing and evaluating board leadership.
3. Highlight steps for effective committees.
4. Learn how to plan for succession.

# Start with Why



- To maintain and grow leadership for a vital and sustainable congregation, a continuous pipeline of prospective and developed board members is required.
- For your synagogue to have a continuous and robust pipeline, intentional steps are essential and must be prioritized and activated.



# Intentional Pipeline & Recruitment Process

# Who's in the Pipeline?

- Committee Members
- Volunteers
- Donors
- Members Who Show Up
- Community Leaders
- People who Self-Identify via Application
- Others?



Process

# Board Composition

- Customize a board matrix based on your synagogue
  - Current Board Service
  - Competencies & Experience
  - Individual Attributes & Characteristics
  - Networks
  - Strategic Direction Alignment
- Nominating or leadership development committee maintains and reviews regularly

- Time to Give
- Has already made or is willing to make a Commitment
- Personality
- Relative to the others in leadership
- Good fit to work with the professionals
- Motivation
- Other?

## Identifying the Right People Beyond the Matrix

# Board Cultivation & Recruitment

- Who is best connected to the prospects (if anyone)?
- What is their current level of engagement?
- What do they already know about your synagogue and board?
- How can they be cultivated?

# Benefits of Becoming a Board Member

- Social connection
- Pay back/pay forward
- Values/altruistic/warm glow
- Engage deeply in the community
- Community standing
- Professional connections and skills
- Modeling
- Securing the synagogue's future
- Develop skills, learn and grow
- Other?



# The Ask

- Build social connection.
- Thank you for. . .
- Present the synagogue and the board (job description)
- **Ask – Will you join me in volunteering on the board to make an impact in people’s lives and our community? Explain why the prospect is UNIQUELY QUALIFIED TO SERVE ON THIS BOARD AT THIS TIME.**
- Silence!
- **Questions/objections and concerns are common. Answer them.**
- Sell the benefits of being involved.
- Confirm outcome. Thank again!
- Report out. Answer any open questions.



# Developing & Evaluating the Board

# Board Maintenance

- Keep **running list** of names considered – decision made and outcome
- **Board onboarding**
- Assess **training** needs
- **Steward** board members
- **Board evaluation**
- Look at **upcoming term dates** and for holes in skills/competencies, attributes or networks and try to add appropriate people to **committees** to **build your pipeline**
- Look at officers and start **succession** conversations

# Board Development

- Onboarding
- Training
  - Roles & Responsibilities
  - Financial Literacy
  - Storytelling
  - Ambassadorship
  - Financial Resource Development (including solicitation training)
- Conferences
- Mentoring





Board Assessment



Individual Board Member Self  
Evaluation

Board  
Evaluation



# Effective Committees

# Strategic Committee Recruitment



Look at the skills needed  
both now and directionally



Look at people who are  
termining out or rolling off

# Successful Committees

## What are the key ingredients to successful committees?

- A clear **charge** or purpose
- Articulated **goals** that align with the overall strategic goals
- A **work plan** that outlines how the work will get done, when and by whom
- A volunteer **leader** who has a **job description**
- **Volunteers** who have **job descriptions** and are **committed**
- A **staff** point person or liaison
- **Ground rules** that include respect, confidentiality and sharing air
- Well-planned & facilitated **meetings**
- Work time & meeting **time**
- A clear understanding of **reporting expectations** to board (when/how)

# Effective Committee Management



Ask people which committee they want to serve on, match people to a committee that suits their skills and interests



Give committees time to organize/meet



Empower the committees to bring recommendations to the board and to take action



Highlight one committee each board meeting and report in writing ahead of time about all



Align the work of the committees and overall priorities and strategies



Give the committees respect, gratitude and kavod



# Succession Planning

# Succession

Do you know who will succeed your current chair and officers?



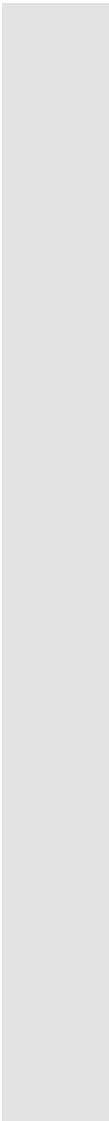
**“Hello, J.G.? I’ve found a volunteer who’s willing to head up the fund drive!”**

Artist could not be located



# Ideal Succession Planning

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- 1-2 years *in residency*
  - Designee in the loop
  - Coaching by organizational leaders
  - Mentoring by outgoing chair or past leaders
  - Boot camp hand-off only if necessary
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# Start Early

- Succession planning starts early
- Lay leader and professional should discuss and put on agenda for *every quarter*
- Maintain a database of prospects
- Evaluations can surface potential leaders
- Informal conversations are encouraged
  - **Could you see yourself as Chair or as an Officer?**
  - **Are you interested in serving as Chair or as an Officer?**
- Ask for recommendations from current and past Board and committee members
- Look broadly, ask committees, donors, staff, & community partners for recommendations

# Job Description

- What are the current position's responsibilities?
- How is the job going to change, if at all?
- How long is the position?
- What is the expected weekly time commitment?
- What training is given?
- What support is provided?
- With whom would the person work with on the professional staff?  
Other lay leaders?
- What are the big issues the synagogue expects to be dealing with?

# Having Trouble with Succession - Why?

- Are you open to a different type of leader?
- Are you looking beyond the usual suspects?
  - Experienced “Outsider”
  - Inexperienced “Insider”
- Consider job descriptions and roles may have to be redefined or negotiated
- Are you selling the experience and the team?
- Have you considered co-chairs?
- Who is asking?
- Why are people saying no?

# Next Steps

- ❑ Strategically recruit committee members
- ❑ Convene the nominating committee early!
- ❑ Draft board member and officer job descriptions
- ❑ Design a board matrix and perform a gap analysis
- ❑ Create an application if desired
- ❑ Outreach for new prospective board members
- ❑ Create a database
- ❑ Have conversations/interviews
- ❑ Design/update your onboarding experience
- ❑ Schedule trainings
- ❑ Design/update your board evaluation
- ❑ Begin succession conversations



“The single biggest way to impact an organization is to focus on leadership development. There is almost no limit to the potential of an organization that recruits good people, raises them up as leaders and continually develops them.”

-John Maxwell

A network diagram consisting of numerous small, spherical nodes connected by thin lines. The nodes are colored in two distinct groups: blue and red. The blue nodes are primarily clustered in the upper-left and lower-left areas, while the red nodes are more densely packed in the center and right side. The lines connecting the nodes are also colored to match their respective groups, creating a complex web of connections. The background is a light, solid blue color. A large, semi-transparent teal rectangle is overlaid on the left side of the image, containing the text 'Q & A'.

Q & A

# Breakout Rooms

- 11:30- 11:50 am
- Continued Governance Q&A with Nanette
- Networking/Learning from Colleagues and Getting to Know Each Other with Andrew Kastner, VP of Jewish Life
- Return to main room at 11:50 am

# Synagogue Series

- 11/18 10:30 am-12 pm **Ambassadorship**
- 1/20 10:30 am-12 pm **Solicitation Training**
- 2/10 10:30 am-12 pm **Open Forum** – For past participants in the series



**F R I D M A N**

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**STRATEGIES**

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*PLAN TO SUCCEED*

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