

## Board Matchmaking

By Sue Dahling Sullivan, Chief of Staff, Citi Performing Arts Center

When I turned 16, my birthday gift was to celebrate at a nearby dinner theatre where we saw the unforgettable *Fiddler on the Roof*. While I tortured my family with off-key renditions of those songs for months afterwards, it proved to be foreshadowing for a long career in nonprofit arts administration.

Recently, I also realized there was a surprising connection between this theatre experience and nonprofit boards:

Chava:

She (He) might bring someone wonderful----

Hodel:

Someone interesting----

Chava:

And well off----

Hodel:

And important---

Matchmaker, Matchmaker

Make me a match

Find me a find

Catch me a catch

Matchmaker, Matchmaker

Look through your book

And make me a perfect match

-*Fiddler on the Roof*, 1964

Many nonprofit organizations dream of having a *board matchmaker* at its disposal. Someone who can magically help a nonprofit find the ideal candidates to join its board—candidates who can fill distinct needs and provide particular types of support. In reality, many nonprofits already have board matchmakers in their midst—executive directors, governance committees, and/or executive committees—who are working tirelessly to recruit new members and strengthen the board. But making that perfect match often eludes many nonprofits, primarily because of a

### Boston

535 Boylston St., 10th Floor  
Boston, MA 02116  
T. 617.572.2833  
F. 617.572.2834

### New York

112 West 34th St., Suite 1510  
New York, NY 10120  
T. 646.562.8900  
F. 646.562.8901

### San Francisco

465 California St., 11th Floor  
San Francisco, CA 94104  
T. 415.627.1100  
F. 415.627.4575

missed connection between where the organization is in its evolution and what kind of board can be the most helpful.

So how can you accurately define what makes for an effective board at different stages in an organization's life? An important step is to define where your organization is in its development and building a board that fits that phase. In my experience, there are at least four stages in the life of a nonprofit, each requiring a different type of board.

### **Stage 1: Seed/Creating**

There are two alternative scenarios that characterize this stage: 1) A founding leader with a vision who personally recruits a supportive board, or 2) A group of volunteers who gather together because of a common cause or project and incorporate as a board. Both are often characterized as informal smaller groups, intimately linked by a passionate commitment to the cause and/or the leader. These individuals generously give both their time and energy to do whatever it takes to get the organization up and running, blurring the lines between employee and volunteer. You might see them purchasing and planting flowers for their community garden nonprofit, or acting, directing, and ushering as part of the local theatre group. Very entrepreneurial, hands-on, and task-oriented, these boards provide the greatest value through their sweat equity.

### **Stage 2: Early/Developing**

At this stage, the seeds have been planted and are taking root. While volunteers may be reluctant to give up control, they also are aware of needed change if they have transitioned into this stage. The success of the organization begins to challenge how the board and/or founder have operated in the past as the organization's activities expand. Consequently, board members with more diverse and professional expertise may be needed (i.e. legal, financial, marketing) to support this organizational development. While a volunteer board remains critical to maintaining stable operations, financial contributions to the organization assume new importance. Forced to think about its evolving future, an effective board accepts the responsibility of investing in staff as it makes critical choices about control, operations, money, and mission impact.

### **Stage 3: Growth/Building**

With staff leadership more formally in place at this point, strong boards are more focused on their governing role but continue to engage in both tactical and strategic decision-making activities. Based on my experience, these board members are energized by growing an organization and value professionalism. More generous financially, too, the board members accept that fundraising is a formal and growing part of their responsibility. Working via committees to make a measurable difference, the board trusts management to oversee daily operations but often still engages in programmatic discussions. Committee work can leverage board experience in functional areas like marketing and public relations, community outreach, governance, and finance. Mission-aligned backgrounds (i.e. medicine, education, environment) at this stage also can provide sector expertise while navigating the challenges of growth. At some point during this stage, strategic planning inevitably becomes a priority that engages both board and staff.

#### **Stage 4: Sustainable/Maturing**

Effective boards at this stage are attracted to supporting and preserving an enduring institution that has proven mission impact, an established reputation, and strong leadership. Board meetings are less frequent and agendas are focused on higher level strategic issues, assuming a more corporate governance approach. Processes and policies are formalized and streamlined; there may even be several different boards (Directors, Trustees, Overseers, etc.) supporting the organization. In addition to playing key roles in fundraising (endowment, capital campaigns) and financial management (investment, capitalization, risk management), these boards focus on key areas like information technology and diversity awareness, as well as strategic and ethical decision making. Both board and management teams tend to be more experienced, professionalized, and sophisticated, as board members at this stage view their roles as strategic advisors, ambassadors, fundraisers, and fiduciary guardians.

So, what does all this mean? The four stages and effective board profiles offered above are by no means definitive. No doubt there are as many exceptions and permutations as there are nonprofits. Some nonprofits are comfortable existing in a particular stage for the long term, while others mightily struggle as they cope with transitioning between stages. Hopefully, this general framework based on my 25-plus years of experience in the sector can help nonprofits effectively target their board matchmaking efforts as they try to attract the right people, at the right time, to be on the right board for their organizations. Here's to "finding a find" and making that perfect match!

### Sidebar: Board Matchmaking Matrix

One of my favorite board chairs once told me: “I’ve tried to run my life with a balanced philosophy, metaphorically by the head, the heart, and the hand: the head, with the brain, has ideas and knowledge; the heart represents compassion and emotion; and the hand enables us to execute.” In my liberal adaptation, the “Heart” equates to believing in the mission of the organization and must be at the center of every successful board match. The “Head” translates to the type of role played by board members, leveraging their skills and expertise. And the “Hand” relates to execution and how board members are engaged.

The following visualizes the intersection of organizational evolution and board matchmaking through this lens:

