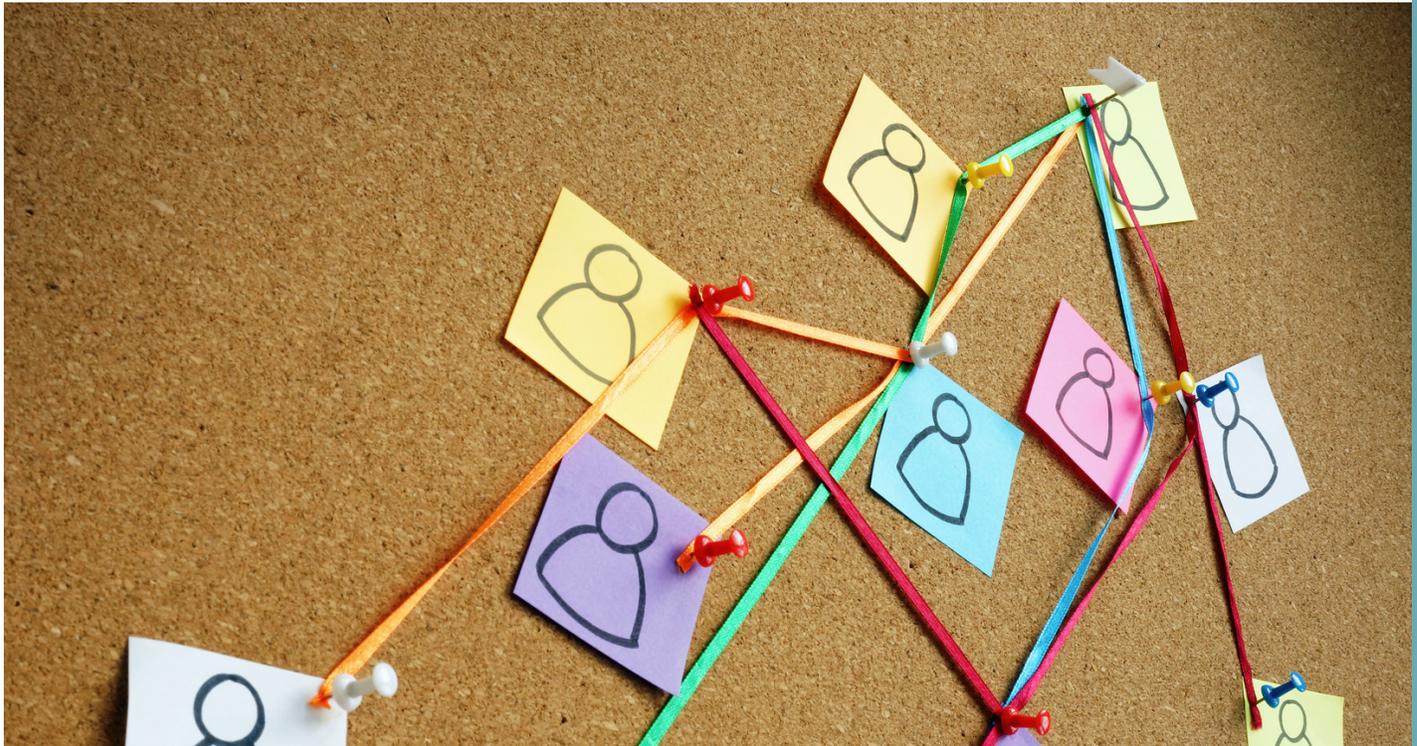




KOREAN AMERICAN
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Best Practices for Associate Board Development

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Introduction

An associate board (AB) is a group of young professionals who rally behind an organization and use their own time, experience, and resources to further its mission. While it can be structured in a variety of ways, it commonly consists of an executive committee made up of a "chair" and "vice chair" with additional support roles such as "fundraising chair", "events chair", and "engagement chair", as well as general members who could be split among the various arms of the board to help carry out its goals.

Typically, organizations start an associate board as a means of:

- cultivating future donors, advocates, and leaders;
- broadening its reach to younger networks; and
- expanding its human capital.

Our goal was to understand the various aspects of creating, maintaining, and developing an associate board, and to bring to light the challenges and opportunities expressed by our partner organizations.

In obtaining data for this report, a total of 11 interviews were conducted with six organization leaders and five associate board members from KACF's grantee partners. Participating organizations had annual budgets ranging from \$1 million to \$27 million and full-time staff numbers ranging from nine to over 240. The state of their associate boards ranged from one that had temporarily ceased activities to one that is involved in supporting multiple departmental functions across its organization.

Interviewees reported lack of organizational capacity, misalignment between the organization and associate board, and succession planning as the greatest challenges to developing and maintaining their associate boards.

Findings

Part I: Capacity of organization's staff

One of the recurring themes brought up during these conversations was the capacity of the staff members whose role it is to manage the associate board. Participants reported that:

- cultivating and managing an associate board can be a significant undertaking for staff that is often outside of their normal scope of work, but there often aren't enough resources (i.e. funding) or motivation to do this work to a level that fits the organization's vision;
- a standing and consistent relationship between associate boards and designated staff was important to maintaining enthusiasm and momentum; and
- without continuous conversations rooting them in their purpose, many associate boards fell out of alignment with the organizations' missions.

"The original members that have been around for a long time are more aligned with [the organization's] mission, but younger members are hard to get consistency from." — Staff Member

When delving more deeply into the topic of staff capacity in overseeing an associate board, it became apparent that in order to successfully create, sustain, and develop one, an organization needs to commit to establishing three key things:

- clarity around the purpose of an associate board,
- its capacity to manage it; and
- the commitment to providing the appropriate support.

Furthermore, discussions with those who had experience with managing associate boards the role of the staff members appointed to do this work was determined to consist of three core areas:

- guiding associate board members in understanding their roles and what they can get out of the experience;
- providing access to information related to the organization's strategy and resources requested by associate board via the organization; and
- setting clear boundaries and pointing the board in the right direction in their efforts.

Part II: Alignment between the organization and the associate board

The topic of "alignment" between the organization and the associate board surfaced in every conversation that happened across both staff and associate board members. Three areas of alignment that were critical for an effective associate board were identified:

- the organization's mission;
- the role of the associate board; and
- the commitment expected of associated board members.

Key areas of alignment between the organization and the associate board	
Organization's Mission	<ul style="list-style-type: none"> • Often found to occur between an organization's executive leadership and its associate board's leadership, which often leads to a strained relationship. • Discussions between organizations and their associate boards tend to focus mainly on events and activities.
Role of the associate board	<ul style="list-style-type: none"> • Many associate board members reported that young people more readily rally behind opportunities to volunteer with direct service organizations. • The Executive Director of one of the larger organizations reported that their organization created associate board-like volunteer structures across all their departments so that the experience is tailored to what individual members are most interested in. (i.e. associate board members who are lawyers volunteer to support the legal services team while others interested in its direct services support the volunteer coordination team. • Unclear expectations for an associate board paired with lack of constructive conversations about its role often leads to a strained relationship between the leadership of the associate board and the staff liaison. • Involvement in volunteering or providing program support versus fundraising and cultivation was found to be an example of misalignment between the associate boards and their organizations.
Commitment	<ul style="list-style-type: none"> • Different expectations of the amount of time and effort that should be put into associate board work between staff and associate board members as well as internally among the associate board members was made evident during these conversations. • Understanding why someone would want to join an associate board and what they want to get out of the experience was stated as being important in adjusting expectations.

Part III: Succession Planning

The question of how to develop members who are motivated to be leaders within the Associate Board was common among associate board members who were interviewed.

- Many of the interviewees who had taken on leadership roles within their associate boards found themselves in the positions because: (a) there was no one else to do it or (b) they were pushed to by former leadership even if they had no desire to do it.
- Both staff and associate board members reported the difficulty in creating a strategy for succession planning due to the unpredictability of associate board members' life situations.
- Identification and recruitment of new associate board members was done via two primary methods: (1) recruitment via associate board hosted events and (2) current associate board members' personal networks

*"I became the chair just because [the previous chair] felt like there was nobody else to do it."
— Associate Board Member*

Recommendations

Consider your organization's capacity to manage an associate board. Appoint a liaison among your staff to:

- assist in the identification, recruitment, and onboarding of associate board members;
- participate in monthly meetings to guide and develop its work;
- respond to and address its ad hoc requests or needs;
- approve and attend events; and
- develop and push forward an annual road map of its work.

Align internally on the purpose of the associate board

- What is the mission of the AB? What is the AB's role in further the mission of the organization?
- How does it further the mission of the Organization?
- What are their goals for the year in service of the AB mission?
- How are they going to accomplish their goals?
- What support do they need from the organization to accomplish their goal? (ie: resources, time)

Understanding each other's interests and expectations for the role

- What is the articulated interest of each AB member of being involved (in addition to their passion for the mission)?
- How have you articulated the organization's interest in an AB?
- What are the expectations of an AB member and the AB as a whole?
- What can an AB member expect from the organization?

Summary of Recommendations

- Be strategic and intentional about managing your associate board.
- Invest time in co-creating an annual "road map" with room for flexibility and focus on a couple of core events or initiatives.
- Ensure that staff assigned to manage the board should not only have the capacity, but the skills necessary to adequately support and develop its members.
- Be clear and direct with communicating hopes as well as expectations, but be ready to have difficult conversations about alignment and purpose when necessary.