



Auburn YMCA

Board Training- Part II

July 29, 2023



Our Plan


Session 1: March 5, 7 – 10 am, Internal Focus:

- Set vision for a governing board
- Define roles and responsibilities
- Create roadmap for success

Session 2: July 29, Staff/Volunteer Partnership:

- Board/Committee Structure – Board work done at committee level
- Building board succession
- Partnership with staff leadership

Session 3: TBD, External Focus

- Role of board in strategic planning
 - Role of board in fundraising – board as connectors
 - Campaign Readiness
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Today's Agenda

- 🔥 Welcome
- 🔥 Recap from First Session
- 🔥 Volunteer and Staff Partnership
- 🔥 Partnership Best Practices and Examples
- 🔥 Auburn Y Opportunities
- 🔥 Group Discussion on Assessing our Y's Board and Committee Structure
- 🔥 Next steps



Welcome

Unique Pairs Ice Breaker



Recap from First Session

March 5, 2023

🔥 Vision

🔥 SWOT

🔥 Roadmap



Recap from First Session

March 5, 2023

Vision:

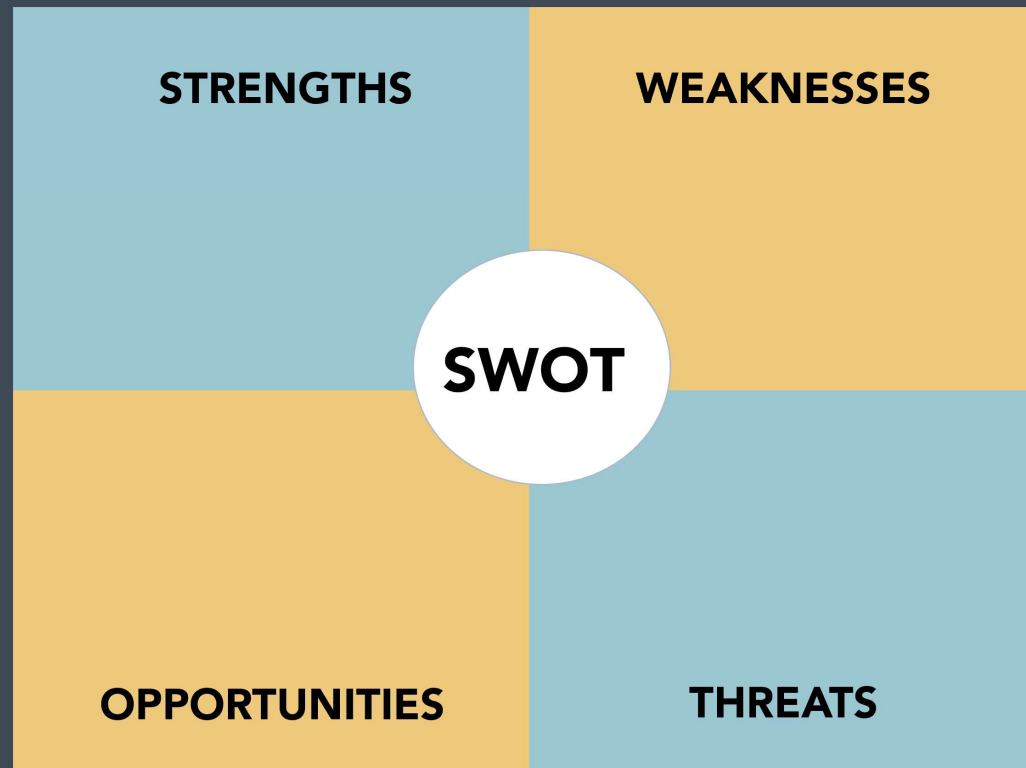
- Less than 3-hour meetings
- Increased engaged board members and volunteers/committees
- Better full collaboration (staff/board)
- Strategic Plan in place (shared vision for future)
- Trust
- Governing Board
- Communication/follow-up
- Not stretched so thin and focused work (bench strength)
- Written processes/calendar
- Build Board relationships - Social
- Fundraising is a priority to establish a culture of philanthropy



Recap from First Session

March 5, 2023

SWOT Analysis:



STRENGTHS

- **Passionate**
- **Various experiences (Y strong over decades)**
- **Professionals**
- **Knowledgeable**
- **Want Y to succeed**
- **See Future**
- **People, People**

WEAKNESSES

- **Not knowing roles and responsibilities**
- **Not diverse**
- **Not having commitment**
- **Shared understanding of purpose**
- **Unclear expectations**
- **How to do work**
- **Buy-in for work**
- **Not wanting to do work**
- **Need to share Y story**
- **Need relationship building**

OPPORTUNITIES

- **Educations/Training**
- **Partnership w/ nonprofits and community leaders**
- **Strategic Planning**
- **Cap on Community Good Will and deep roots**
- **Funding Resources**

THREATS

- **Other Nonprofits**
- **Board Fatigue**
- **Economy - demographic**
- **Competitors**

SWOT

Recap from First Session

March 5, 2023

Roadmap:

- Relationship building
- Board Education/Roles
- Retreat
- How we function as a Board
- Use our meetings to advance strategic priorities
- Understanding Board Composition and identify gaps
- What do we mean by diversity
- Work on the elevator speech
- Document Priorities
- Strategic Planning
- Hire and onboard new CEO and Board
- Pushing D & I
- Shared commitment to be here
- Statement of Understanding/code of conduct
- 100 % Giving
- 100% Getting



What's New?

- 8 new Board members
- Management agreement – Y of Central NY
- CVO transition



Roles of Board

Direction: The board guards the purpose of the organization and, through guidelines, steers it in the right direction.

Oversight: The board monitors the activities, the health, and the ethical behavior in the organization.

Resources: The board ensures that the organization is well-equipped to fulfill its purpose, i.e., has adequate finances, capable staff, and an esteemed reputation.



Roles of Staff

- ◆ The CEO is responsible for **maintaining regular contact with the board** and, particularly, the chair.
 - They keep the board informed about the issues and activities that are part of the organization's daily life.
- ◆ CEO is responsible for **daily management of the organization** and day-to-day operations.
 - CEO reports to the board,
 - Staff report to CEO.
 - The staff helps the chief executive more efficiently implement the directives set in partnership with the board.



part·ner·ship

A collaborative relationship between two or more parties based on trust, equality and mutual understanding for the achievement of a specified goal where each partner has needs and brings value



What makes partnerships successful?

Common Vision

Measurable Goals

Clearly Stated Needs and Responsibilities

Shared Values

Trust and Open Communications





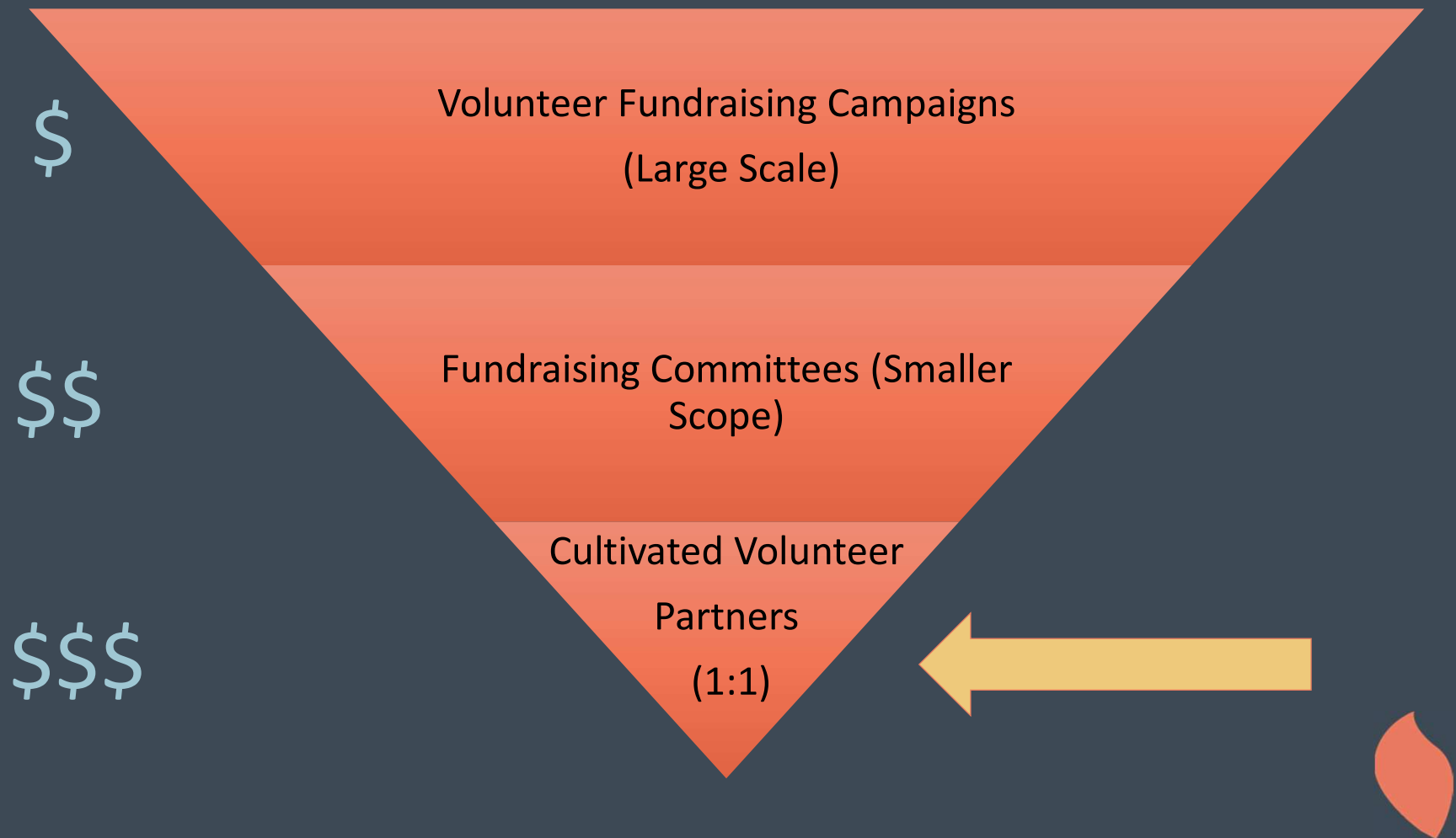
Powerful Pairs!

How do we achieve strong Volunteer/Staff Partnerships?

- ◆ Understanding of Roles
- ◆ Understanding of each other's strengths and challenges
- ◆ Open Conversation
- ◆ Good communication
- ◆ Practice
- ◆ Openness to breaking the mold
- ◆ Praise
- ◆ Gratitude



Targeted Partnership Engagement (i.e. in fundraising)





WHAT MOTIVATES YOU?

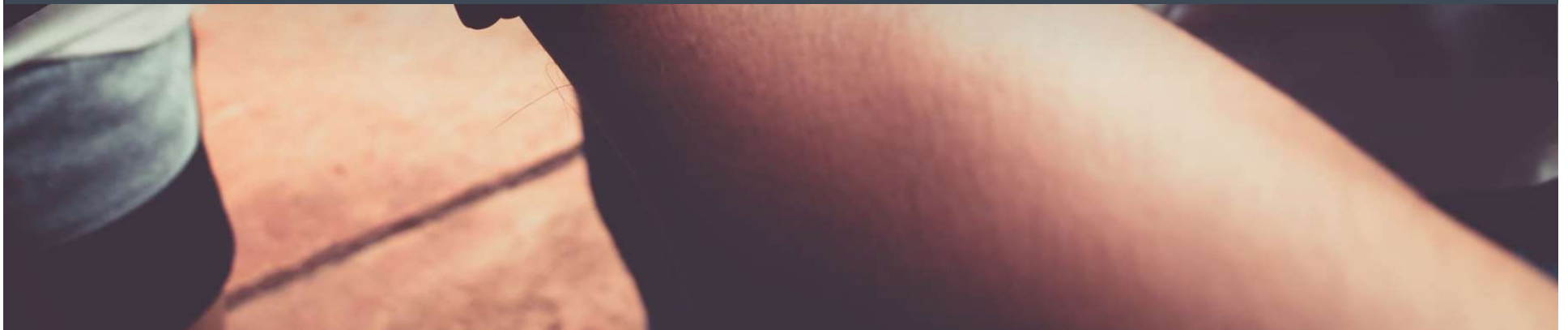
AS A VOLUNTEER?

AS A STAFF
MEMBER?





Great Volunteer and Staff Partnerships in Action



ADVOCACY!



EVENTS!

CALL FOR GOLF COMMITTEE VOLUNTEERS



We are looking for
Golf Tournament Committee Members to help
make the event a success.

YMCA of the Pines
35th Annual Golf Tournament
Monday, May 8, 2023
Medford Lakes Country Club



FUNDRAISING!



Common Themes

- ◆ Clear understanding of roles/responsibilities
- ◆ Shared understanding of goals and objectives
- ◆ Collaboration is result of strategic plan, organizational priorities
- ◆ Mutual Respect



Work of board happens through strong committees

Board/Strategic Planning Sets Key Goals/Objectives



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graph TD; A[Board/Strategic Planning Sets Key Goals/Objectives] --> B[Prioritize Goals Objectives]; B --> C[Informs committee work – committees make recommendations/report to board. (Committee Commissions)]; C --> D[Committees - Strategic and Resource to Staff - Work action plans]; D --> E[Staff liaisons – work together on agenda building with chair];
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Prioritize Goals Objectives

Informs committee work – committees make recommendations/report to board. (Committee Commissions)

Committees - Strategic and Resource to Staff - Work action plans

Staff liaisons – work together on agenda building with chair

BREAK



COMMITTEE WORK



WHAT'S WORKING?



WHAT'S NOT WORKING?

WHAT DO YOU BRING TO THE TABLE?

AS A VOLUNTEER?

AS A STAFF
MEMBER?



“The whole is greater
than the sum of its parts”





THEORY INTO PRACTICE

Our Y: Big Topics Facing Our Y

- Strategic planning
- Capital planning
- Senior leadership transition (CEO, B&G)
- Existing staff wearing multiple hats
- Management Agreement Opportunities (operational/infrastructure)
- Fundraising/Philanthropy
- Communication/Marketing/Awareness Building
- Board Development/Engagement/Education



A black and white photograph of two hands shaking, symbolizing agreement or partnership. The hands are clasped together in a firm grip, with the fingers of one hand wrapped around the other. The background is blurred, showing what appears to be a person's face in the distance. A dark blue horizontal band is overlaid across the middle of the image, containing the text "HOW DO WE WORK TOGETHER?" in white, uppercase letters.

HOW DO WE WORK TOGETHER?

What's needed to take on these opportunities?

AS A VOLUNTEER?

What do volunteers need from staff to be successful?

AS A STAFF MEMBER?

What do staff need from volunteers to be successful?



What's fair for
VOLUNTEERS to
expect from
your
organization?

Clear description of role and responsibility

Have a role in decision-making for the organization

Supportive staff providing data needed to evaluate the organization and guide planning

Organization transparency and accountability

Support the work of the committees and respond to requests

Access to Board training



What's fair for **STAFF** to **expect** from your volunteers?

Be an advocate for the organization

Be a donor

Share their expertise to help guide the organization

Work closely with professional staff

Open the door to their network

Support relationship building

Will respond to communication to keep things moving



The background of the slide is a close-up photograph of a dark asphalt road. Several white, hand-painted arrows are visible, all pointing towards the right side of the frame. The arrows are slightly worn and have a textured appearance. In the upper-left quadrant, there is a white rectangular box with a thin black border.

NEXT STEPS



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