



HOW TO CREATE YOUR FOUNDING ASSOCIATE BOARD

A HANDBOOK FOR NONPROFITS

WHAT IS AN ASSOCIATE BOARD?

An associate board is a leadership group made up of young professionals who, through their own time, talent and resources, help expand the capacity and advance the mission of a nonprofit.

Members are usually between the ages of 25 and 35 years old, and are the rising leaders in their respective industries.

Similar to a governing board, members meet on a scheduled basis, have fundraising goals, plan initiatives or events, and help connect the organization to helpful resources. However, an associate board has no governing responsibilities for an organization.

WHY SHOULD MY ORGANIZATION BUILD AN ASSOCIATE BOARD?

An associate board is an effective engagement tool to ultimately ensure the ongoing success and longevity of an organization. Nonprofits build associate boards to:



Cultivate a pipeline of future leaders and donors – Associate boards are an incredible way to introduce your mission to a passionate and enthusiastic audience. As these young professionals continue to progress in their careers, they will likely become your core donors, advocates and in many cases, governing board members.



Expand resources, human capital and ideation – While a governing board is focused on strategy, an associate board can be a vital resource for the recruitment of capable volunteers for projects or events, bringing energy and new ideas to the table.



Connect with a younger demographic and grow your network – Associate board members will raise awareness among their peers and introduce your mission to a larger, untapped audience.



WHY WOULD A YOUNG PROFESSIONAL JOIN AN ASSOCIATE BOARD?

An effective associate board is a fulfilling and effective way for a young professional to give back, growing with the organization as they grow in their career. The best associate board experiences encourage members to make an impact, connect with like-minded peers, network with industry leaders, learn new skills and gain new perspectives.

WHY IS IT CALLED AN ASSOCIATE BOARD?

Nonprofits have often named these groups “Junior Board,” “Young Professionals Board,” and many others. The weight of evidence suggests that using the name “Associate Board” will attract high caliber, more dedicated members. The terms “young” or “junior” do not communicate the importance of the role, which may translate into decreased efforts or participation.

WHAT IS CARICLUB AND HOW CAN THEY HELP MY ASSOCIATE BOARD?

CariClub is a free, digital platform for nonprofits to connect with talented young professionals interested in getting involved, especially at a leadership level. We partner with top tier companies to help their employees connect with causes they are uniquely passionate about. When a member shows interest in an opportunity, CariClub facilitates the introduction, allowing the nonprofit to recruit as they see fit.

And yes - we did say free. Our corporate partners pay an annual subscription fee to have access to CariClub, enabling us to offer our platform to nonprofits free of charge. The USTA Foundation, BUILD, the ADL, KIPP Charter Schools and hundreds more have already built their CariClub profiles and started recruiting on CariClub’s platform...we'd love to have you to join them!

PREFACE

In the summer of 2016 **CariClub** founded **The General Assembly**, a collective of young philanthropists who, through their own time, talent and resources, have made significant contributions to the associate board space. Their mission was to collaborate as thought leaders and share best practices on the associate board experience.

Together, with the input of The General Assembly and the data of nearly 500 nonprofits, CariClub created the following handbook to ensure organizations could build or enhance their current associate board.

The following 5-step guide is an evolving tool with aims to ultimately:

Help nonprofits
build the proper
mechanism to
engage young
professionals

Provide a platform to
cultivate and inspire
the next generation
of leaders and
philanthropists

Infuse the
nonprofit sector
with impressive
and energetic
young talent

PREFACE

CariClub would especially like to thank the following members of The General Assembly who contributed to this document:

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While an associate board can operate fairly autonomously, you should confirm you have internal support to build one. It is important to make this effort a priority - after all, these are your next volunteer leaders and major donors!

Be sure to:

① Confirm an internal point person

This person will help oversee your associate board, be the liaison to the organization and report on the associate board's success.

② Determine a budget

While an associate board does not require any cost to set up, you should still set aside funds to help drive the success of the board. This could be fronting the money for the cost of a venue or providing pizza for your members at meetings. On average, associate boards have a budget between \$5,000 and \$25,000, depending on event goals.

③ Set your goals

It's important to set expectations and goals for your associate board to reach in Year 1. This will also be important to define success and report back to your governing board. Be sure to forecast how many members you'd like to recruit, a goal for overall fundraising and any other important metrics that pertain to the purpose of your associate board. Note that in the first year your overall fundraising goal will largely be based on the individual fundraising requirements for each member.

④ Create your CariClub account

Create your CariClub page as soon as possible to start generating interest and building a pipeline of incredible professionals to support your work. To do this visit CariClub.com and request your invitation by clicking **Learn More for Nonprofits**. The CariClub team will work with you to create a profile and get your page up and running.

STEP 2 - LAY THE FRAMEWORK

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Now that you have the support from your team and your CariClub account is active, it's time to build the foundation for success!

PURPOSE & MISSION

BENEFITS

1

2

3

4

ROLES &
RESPONSIBILITIES

STRUCTURE

1 Determine the Purpose and Mission

Determine the purpose and mission of your associate board. Be thoughtful about what your organization needs and where it can use the most help.

Remember, *purpose guides you and mission drives you*. The purpose of an associate board should answer the question: "Why does the associate board exist?" The mission of the associate board should answer the question: "What does the associate board do?"

Generally speaking, the purpose of an associate board is to build the next generation of leaders for an organization. The mission of the associate board is to drive resources and raise awareness to help an organization achieve its overall programmatic mission.

② Set the Roles and Responsibilities

Now that you have clearly laid out the purpose and mission of the group, align your roles and responsibilities accordingly. You will find young professionals are more than happy to help, but you need to tell them exactly how. Set these expectations in a clear and concise manner so that your members know exactly what is expected of them once they join your associate board. Remember, if your purpose is to cultivate your next generation of leaders, your responsibilities should mirror as such.

Associate Boards have these responsibilities broken down into 3 categories:



Give/Get:

Members should be required to make a financial commitment to your associate board, achieved through a combination of in-kind gifts, friend-raising, ticket sales to fundraising events and their own contributions.

Things to keep in mind:

- Don't be afraid of your give/get! Attaching a financial commitment to your associate board expresses the importance of the group and will attract a higher caliber of members who are willing and ready to make an impact.
- Most associate boards have an average give/get of \$1,000, with most members far exceeding this goal. Remember that ticket sales to event and in-kind donations all count toward this number!
- Consider a required goal and an aspirational goal. Many organizations do this to help push their members to be more successful. This could be a required goal of \$500 and an aspirational goal of \$1,000, or a required goal of \$1,000 and an aspirational goal of \$2,500. In most cases your members will strive to reach higher for you.

STEP 2 - LAY THE FRAMEWORK



2.2 Set the Roles and Responsibilities



Meetings

Members should come together on a regular and scheduled basis to ensure they are actively engaged, contributing, and up-to-date with happenings and initiatives for the organization.

Things to keep in mind:

- On average, associate boards meet 4 - 6 times per year. This will ensure the group is active and engaged throughout the year.
- Smaller subsets or taskforces of the board may meet more frequently, depending on projects or events, usually by phone.
- Members should be required to attend at least 75% of meetings, and should be allowed to participate via phone when physical presence is not possible.



Events

Members should work on projects or events throughout the year to help spread awareness and drive resources for the organization.

Things to keep in mind:

- Social events are a great way to drive your fundraising and marketing initiatives! Most groups will host one small event, such as a happy hour or a spin class fundraiser, and one larger event such as a cocktail hour. Decide what is reasonable for your first year and make participation a requirement in your roles and responsibilities document.
- Events should always make sense for your organization and be aligned with your overall strategic goals. The group should take ownership of their own activities, but you should provide some direction as to what will be the most effective based on your goals.

STEP 2 - LAY THE FRAMEWORK

2.3 Build Out the Benefits

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Here are some helpful examples:

- If you are looking to recruit more mentors for your programs, allow the associate board to host a small cocktail event to help drive more signups.
- If you are trying to increase attendance at your spring gala, direct the associate board to host a smaller event in the winter to help build relationships and spark interest for the spring event.

3 Build Out the Benefits

To set your associate board apart from others, build out benefits for your members that are easily accessible to your organization.

Things to Consider:

Opportunities for Professional Growth and Networking

- Facilitate mentor relationships between governing board and associate board members
- Host mixers or networking events exclusively with governing board members
- Invite members to sit in on governing board meetings on a rotating basis, and have them report on associate board progress

Special Events and Experiences

- Complimentary or discounted tickets to your annual gala or fundraiser
- Complimentary or partly subsidized trip for top fundraisers or high performing individuals to experience or visit your programs in the field (most appropriate for international organizations)
- Exclusive opportunities to engage with your programs and experience your work first-hand

STEP 2 - LAY THE FRAMEWORK

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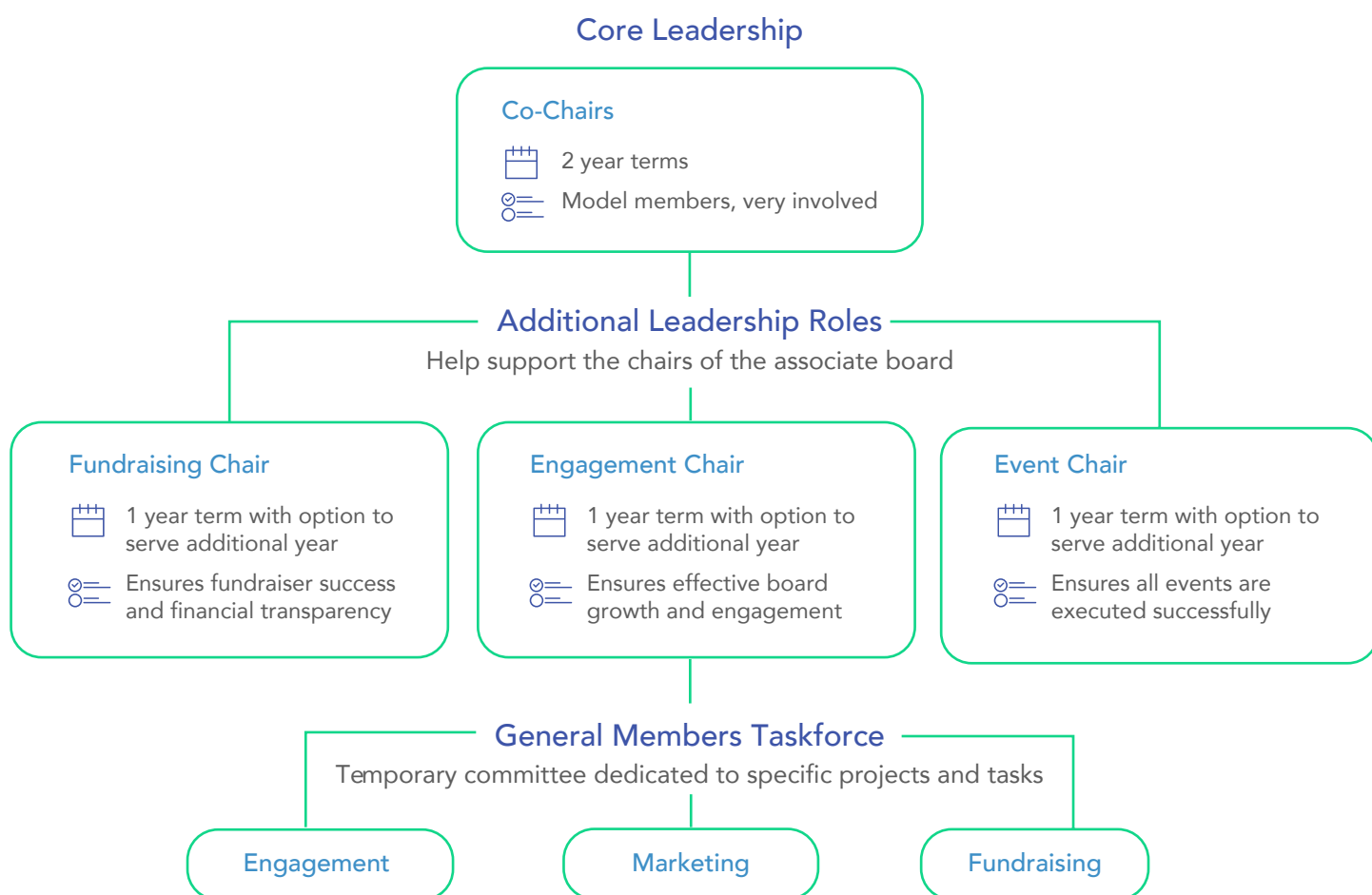
2.4 Determine Your Structure

Recognition

- Associate board member names and titles listed on your website and relevant marketing materials
- Recognition or award given at a large annual event for top associate board performer/fundraiser

4 Determine Your Structure

Once you know the purpose of your associate board, what you want your members to do, and what benefits you can extend, set a structure that will be scalable and allow for others to take on leadership roles.



STEP 2 - LAY THE FRAMEWORK

2.4 Determine Your Structure



Co-Chairs

- **Purpose:** Your co-chairs will lead the charge and set the example for your members and ensure overall success of the board.
- **Terms:** Co-chairs should serve in staggered 2-year terms. By doing so, you will always have one experienced member and one new member to bring new energy and ideas.
- **Roles:** Co-chairs should be model members for your associate board and set the example of performance and participation. They do not always have to be your top fundraisers, but will be incredibly involved, passionate and engaged with with your organization and have a history of helping drive significant resources, whether monetary or in-kind. This will help set the standard for 'what it takes' to be a leader and ultimately drive other members to do the same.

Basic responsibilities include:

- Ensure the overall success of the associate board
- Serve as the main point of contact between the nonprofit and the associate board
- Schedule meetings, set agendas and send any follow up communications
- Lead meetings and encourage participation
- Work with the organization to make final decisions on events, members, new processes, etc.
- Hold all members accountable for their required participation and fundraising goals

STEP 2 - LAY THE FRAMEWORK

2.4 Determine Your Structure

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Additional Leadership Roles

Appoint leaders to help support the co-chairs. These individuals should help with the overall maintenance and oversight of members, as well as lead initiatives. Roles should also coincide with the overall purpose and mission of the associate board. Typically, these roles include:

Fundraising Chair:

- **Purpose:** Ensure the overall fundraising success and financial transparency of the associate board
- **Term:** 1-year term, with the option to serve an additional year, at the discretion of the co-chairs
- **Role:** The fundraising chair will track the overall fundraising goals of the associate board. This includes individual give/get goals as well as in-kind contributions. This person also works with the organization to provide appropriate fundraising tools for members, and acts as the lead on any major fundraising initiatives of the associate board. This member will report up to the co-chairs on overall progress throughout the year.

Engagement Chair:

- **Purpose:** Ensure effective growth and engagement of the associate board
- **Term:** 1-year term, with the option to serve an additional year, at the discretion of the co-chairs
- **Role:** The engagement chair will vet, onboard and welcome new members to the associate board. This person also is responsible for promoting/posting engagement and volunteer opportunities for new and prospective members.

Event Chair:

- **Purpose:** Ensure all events are executed successfully
- **Term:** 1-year term, with the option to serve an additional year, at the discretion of the co-chairs
- **Role:** The event chair will be the point person for all events. This person leads logistics and planning, as well as liaises with the nonprofit and co-chairs on progress and success.

STEP 2 - LAY THE FRAMEWORK

2.4 Determine Your Structure

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General Member Taskforce

Once you have your leadership positions in place, add a fluid structure for the rest of your associate board. Leverage taskforces to encourage engagement and strategic participation across your membership to drive real action quickly and effectively.

What is a taskforce?

A taskforce acts as temporary committee, dedicated to a certain project or task and overseen by a relevant leadership role. As different initiatives arise, a taskforce of interested members should be put together to carry out the goal at hand. Once the goal or event is completed, the taskforce will dissolve and a new initiative can be carried out. This allows for those with particular skills or interests to volunteer for projects that also align with their schedules.

For example:

Event Taskforce:

An associate board wants to plan a panel discussion on careers in STEM for the students within the nonprofit's program. A taskforce of five associate board members comes together to volunteer to recruit panelists. The taskforce works together with the event chair to ensure the event is successfully executed. After the event, the members report on the results, share meaningful insights from the event and the taskforce *dissolves*.

Marketing Taskforce

An associate board wants to develop a new and improved 1-pager to advertise their board and drive member recruitment. A taskforce is assembled to work with the engagement chair to build out proper marketing material. Once the document is approved by the nonprofit leadership, the taskforce *dissolves*.

STEP 2 - LAY THE FRAMEWORK



2.4 Determine Your Structure

Fundraising Taskforce

An associate board wants to host a large fundraising cocktail event. They will need to find a venue, corporate sponsors, and promote the event on social media. A taskforce of eight members overseen by the event chair comes together to find a venue and coordinate vendor logistics. Another taskforce of three members and the fundraising chair comes together to build out a sponsorship documents for all members to use for corporate sponsor donations. Another taskforce of two members overseen by a co-chair comes together to create a ticket sales page on Eventbrite.com and develop a social media strategy to drive awareness.

See Appendix A for helpful templates to start your associate board

See Appendix B for meeting best practices, ideas and agenda templates

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STEP 3 - RECRUIT YOUR LEADERS



Your next step is to recruit your co-chairs and leadership roles. It is important to build a strong foundation, so your founding members should either be individuals you know or strong leaders that are genuinely committed to your mission. A good associate board is led by example and your leaders should be exemplary in the way they support your organization, especially through resource development. To find your founding members, consider the following networks:

- **CariClub** - Let the CariClub team know you are actively recruiting for co-chairs. They can work with you to help handpick members who might be a good fit or by customizing language on your CariClub page to help drive interested and leading members to your organization.
- **Governing board members** - Are your governing board member's families active in your organization? Usually children, grandchildren, nieces or nephews of the governing board are willing to get behind your cause. Other examples might be rising employees at their firms who have shown an interest in giving back and getting involved.
- **Past fundraisers or volunteers** - Do you have an arsenal of already dedicated volunteers who help out at events? Or perhaps you've had young professionals run a marathon or fundraise for your organization. Use the associate board as a way to get them more formally involved.
- **Corporate relationships** - Do you have any dedicated corporate sponsors who always host a volunteer day with your program? Or perhaps support you annually with a generous gift. Work with your corporate relations team to network, as this will ultimately drive and develop your relationship even more, solidifying it for future support.
- **Alumni of your program** - If your nonprofit serves youth who graduate from your program and go on to do great things, ask them to come back and participate on your associate board. These individuals could be your best advocates, as they already have intimate knowledge of your work and are living proof that it's working!

Let's summarize...

- ☒ You have internal support
- ☒ Your CariClub profile is live
- ☒ You have determined the purpose, mission and structure of your associate board
- ☒ You have recruited rockstars to lead the charge

Now you're ready to launch
your associate board!

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Schedule a formal kickoff meeting with your chairs to all meet one another, introduce your CariClub page, and most importantly get excited and inspired! Remember that although your chairs will lead your group, it's important to have structure in place to help guide them.

For your meeting, present your chairs with an agenda to:



Introduce one another

- Personal and professional backgrounds
- Reason for involvement
- Icebreakers or fun facts



Review your overall roles and responsibilities document

- Give/get individual goals
- Meeting requirements



Review individual roles and responsibilities

- Co-Chairs
- Event Chair
- Fundraising Chair
- Engagement Chair



Review annual goals

- How many members you aim to recruit in the first year (at minimum)
- How much money you hope to raise
- Other metrics or goals you hope to achieve in the first year

Once you have reviewed these goals, decide on actionable outputs for next steps. Each member should try to recruit one member each from his or her own internal network.

STEP 4 - LAUNCH YOUR BOARD!



Don't forget to summarize!

Make it a habit to send around a quick summary of what was discussed at the meeting and reiterate action items. This task should be delegated to one of the co-chairs and remain a consistent policy throughout the lifetime of your associate board.

See Appendix B for launch meeting agenda and subsequent template agendas

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Get excited, you're on a rocket ship now. Young professionals are looking for ways to give back and get involved - and your associate board is exactly it! Your next step is to let talented and driven young professionals know you exist. To ensure growth in the first year, consider the following:

Review and finalize your CariClub profile

Your CariClub profile is an incredibly powerful tool to recruit members from varied and impressive networks. Be sure that:

- Your mission, programs, impact and history are presented in the most clear, concise and attractive manner
- Your video is the latest or most interesting 2 to 4-minute representation of your work
- Your logo and cover image are high resolution
- Your governing board members are up to date with associated companies
- Your roles and responsibilities for prospective members are clear
- Other opportunities for involvement are posted
- New and upcoming events are listed

Host a free social or learning event

Events are an incredible way to get in front of a lot of individuals at once. Leverage your founding associate board members to invite their networks and others to a happy hour, mixer or interesting speaker/roundtable discussion to learn more about your organization. The event should be complimentary and should have several minutes dedicated to talking about your programs and sharing your work. You should also have a call-to-action so those who are interested in getting involved can do so.

Member networks

Your chairs should be an incredible and credible resource for referrals. Task each chair to recruit at least 1 – 3 prospects for your associate board in the first 6 months.

A FEW KEY THINGS TO REMEMBER:

- **Be accessible!**

Make it easy for new members to join. This should be as easy as applying to CariClub, having a meeting or call with you and extending an invitation to the next meeting. If all goes well from there, extend a formal invitation to join.

- **Be inviting!**

The more the merrier - remember these are your future leaders and donors so be inclusive, as appropriate. If you're finding your associate board is getting too big to manage, don't turn members away. Consider providing two tiers of membership for people to get involved. This could be a low give/get where the group helps support the associate board by attending events or joining the event committee, and a higher give/get where formal associate board roles and responsibilities apply.

- **Be shareable!**

Young professionals are the leaders of the digital age and your associate board should be a reflection of that! Make sure your CariClub page is up and running with interesting content for your members to share and boast to others about all the wonderful things you are up to. This will prompt others to join too!

- **Be meaningful!**

Above all else, provide a meaningful experience for your members. Provide opportunities for your members to get involved and experience your work first hand. This could be as easy as volunteer days with your programs, inviting beneficiaries of your programs to meet members at associate board meetings, or sharing stories of lives changed.

APPENDIX

The following appendices are meant to serve as helpful examples, tips, and best practices for your associate board. All template materials are available for your organization to use as starting materials to help improve or build your associate board. Please use these materials freely and reach out if you have questions.

APPENDIX A - STARTER TOOLS

- A.1 Roles and Responsibilities Template
- A.2 Internal Framework Template

APPENDIX B - MEETING TOOLS

- B.1 Best Practices
- B.2 Meaningful Experiences
- B.3 Template Agenda

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ASSOCIATE BOARD OVERVIEW

Mission

The ORG NAME Associate Board is a group of emerging leaders who dedicate their own time, talents, networks and resources to raise awareness and support for the work and mission of ORG NAME.

Roles and Responsibilities

The role of an Associate Board member carries with it the responsibility to serve as a committed supporter and thoughtful advocate for ORG NAME. The specific responsibilities that all members are asked to accept are included below.

<i>Expectations and Responsibilities of Board Member</i>	<ul style="list-style-type: none">• Spread awareness of ORG NAME and its mission• Give or Get \$1,000 annually*• Attend and invite people from your network to our events• Engage with and help build our community of advocates
<i>Time Commitment</i>	<ul style="list-style-type: none">• Serve a term of 2 years• Attend or call into four of the six Associate Board meetings each year, varying number of taskforce meetings as needed, and special events
<i>Staff Support</i>	<ul style="list-style-type: none">• Associate Board members will receive regular, timely, and accurate information from ORG NAME staff• ORG NAME Associate Board members will receive staff support in fulfilling their responsibilities, particularly as they access their networks to secure support and the give/get of \$1,000
<i>Benefits</i>	<ul style="list-style-type: none">• Become part of the prestigious ORG NAME network:<ul style="list-style-type: none">◦ Network with the ORG NAME Governing Board Members◦ Your name will be included on related Associate Board marketing materials and our website• Exclusive invitations to special events with ORG NAME• Special programmatic opportunities

** The "give or get" policy is a "best practice" in the fundraising space. "Give or get" policies mean that each board member is expected to donate a certain amount of money per year from their personal resources ("give"), or help raise money and/or drive in-kind resources from others to the organization that have a monetary value ("get").*

ASSOCIATE BOARD INTERNAL FRAMEWORK

Purpose

The ORG NAME Associate Board will be a powerful engagement tool to cultivate the next generation of leaders and supporters of ORG NAME. Together, in collaboration with the Governing Board, ORG NAME will leverage the Associate Board as a gateway to engage talented volunteers, reconnect with alumni, and raise awareness among a younger generation to ensure the longevity and support of our organization.

Goals

In the first year of it's founding, the ORG NAME Associate Board aims to:

- Recruit one lead chair and supporting leadership roles
- Recruit an additional 7 - 12 general members
- Host 2 cultivation events, and 2 fundraisers (varying in size)
- Increase an overall awareness of ORG NAME among a younger demographic

Expectations

Members will work together to leverage their time, talent and resources to advance the mission of ORG NAME. In doing so, all members, at all levels, will be held to the expectations outlined below. Annual reviews of each member's contribution will be conducted by Associate Board leadership to ensure participation and/or encourage increased engagement.

Financial Commitment

- Members are responsible to give or get monetary or in-kind resources equivalent to, or greater than, \$1,000 each year.

Time Commitment

- **Meetings**
 - o Members are required to attend at least four of the six board meetings each year. Members will be provided with the opportunity to dial-in, should physical presence not be possible.

- o Meetings will be scheduled by Associate Board leadership in coordination with ORG NAME leadership. These meetings should be in the evening and hosted at a central location.
- o Each member will serve a term of 2 years, with a mid-term review, conducted at the start of each year by Engagement Chair and Associate Board leadership

Participation

- **Associate Board Events**
 - o Members will attend at least 2 Associate Board events each year and contribute in a meaningful way, through either ticket sales or in-kind contributions
 - o Members will lead or join at least 1 special taskforce initiative throughout the year
- **ORG NAME Events**
 - o Members will attend the ORG NAME annual fundraiser each year
 - o Members will invite at least 4 guests to ORG NAME events throughout the year.
- **Awareness**
 - o Members will serve as thoughtful advocates for ORG NAME, staying up to date on its mission, programs and events and issues related to ORG NAME
 - o Members will introduce the work of ORG NAME to internal networks through word of mouth, social media and/or personal introductions, to help increase awareness.

Structure

The Associate Board will be led by two Co-Chairs who will ensure the overall success of the Associate Board. Co-Chairs will be supported by additional leadership roles, including Event, Fundraising and Engagement Chairs to ensure constant momentum and engagement of the board. All other members have the option to join taskforces.

Co-Chairs

- **Purpose:** Ensure the overall success of the Associate Board.
- **Term:** Co-Chair roles will serve staggered terms in 2 year intervals. In the first year of the Associate Board's existence, ORG NAME will welcome one Chair. As the Associate Board builds in the second term year, a second Chair will be appointed. From there, each term a new Chair will be appointed and the more senior Chair will roll off.
- **Roles:** Co-Chairs are model members of the Associate Board and set the example of performance and participation. Co-Chairs do not always have to be the top fundraisers, but will be incredibly involved, passionate and engaged with ORG NAME. These members have a history or willingness to drive significant resources for the organization, whether monetary or in-kind.

Basic responsibilities include:

- Ensure the overall success of the Associate Board
- Be the main point of contact between ORG NAME and the Associate Board
- Schedule, set agendas and send any follow up communication for all meetings
- Lead meetings and ensure everyone has an opportunity to participate
- Work with the organization to make final decisions on events, members, new processes, etc.
- Hold all members accountable for their required participation and fundraising goals

Fundraising Chair

- **Purpose:** Ensure the fundraising success and financial transparency of the Associate Board
- **Term:** 1-year term, with the option to serve an additional year, at the discretion of Co-Chairs and ORG NAME leadership
- **Role:** The Fundraising Chair tracks the overall fundraising goals of the Associate Board. This includes individual give/get goals as well as in-kind contributions. This person also works with the organization to provide appropriate fundraising tools for members, and acts as the lead on any major fundraising initiatives of the Associate Board. This member will report up to the Co-Chairs on overall progress throughout the year.

Engagement Chair

- **Purpose:** Ensure effective growth and new member relationships of the Associate Board
- **Term:** 1-year term, with the option to serve an additional year, at the discretion of Co-Chairs and ORG NAME leadership
- **Role:** The Engagement Chair will vet, onboard and welcome new members to the associate board. This role is also responsible for promoting/posting engagement and volunteer opportunities for new and prospective members.

Event Chair

- **Purpose:** Ensure all events are executed successfully
- **Term:** 1-year term, with the option to serve an additional year, at the discretion of Co-Chairs and ORG NAME leadership
- **Role:** The Event Chair will be the point person for all events. This person also leads logistics and planning, as well as liaises with organization and Co-Chairs on progress and success.

All Other Members

- **Taskforce:** Once leadership positions are in place, the Associate Board will add a fluid structure for general members by leveraging taskforces to encourage more engagement and strategic participation across membership to drive real action quickly and effectively.
- **What is a taskforce?** A taskforce acts as a temporary committee, dedicated to a certain project or task and overseen by a relevant leadership role. As different initiatives arise, a taskforce of interested members will be put together to carry out the goal at hand. Once the goal or event is complete, the taskforce will dissolve and a new initiative can be carried out. This will allow for those with particular skills or interests to volunteer for projects that also align with their schedules.

Benefits

ORG NAME will provide special opportunities to ensure the professional development, stewardship and cultivation of their Associate Board members: These may include:

Opportunities for Professional Growth and Networking

- Mixers or networking events exclusively with Governing Board members
- An invitation for members to sit in on Governing Board meetings on a rotating basis and report on Associate Board progress
- Mentor opportunities between Governing Board and Associate Board members

Special Events and Experiences

- Complimentary or discounted tickets to the annual gala or fundraiser
- Exclusive opportunities to engage with our programs and experience ORG NAME 's work first-hand

Recognition

- Associate Board names and titles listed on ORG NAME's website and relevant marketing materials
- Recognition or award given at at large annual event for top Associate Board performers and/or fundraisers

ASSOCIATE BOARD INTERNAL FRAMEWORK

Agendas

- ALWAYS send an agenda prior to your meetings, preferably 24 hours in advance, to ensure everyone is up to speed.
- Allocate minutes to each agenda item to allow the meeting to keep on pace. If a particular item requires more discussion than the time allocated, take that conversation offline with appropriate parties and follow up with the group on any final decisions or resolutions.
- Use the “parking lot” method for any discussion points that arrive from items outside of your agenda. This means acknowledging the piece of the discussion or question that is not in line with the agenda and following up with the related parties separately, after the meeting.

Timing

- Host meetings at a time that is most convenient for your members, allowing for the most participation. Most associate boards host meetings in the evenings, on either a Tuesday or a Wednesday, after 6:30PM.
- Keep your meetings to a set time frame and have a productive agenda with action items for members to walk away with. Meetings should be no more than 90 minutes.

Location

- If your office is out of the way, encourage your members to guest host the meeting at either their own offices or a central location.
- Be aware that summer months may be lighter in terms of activity and participation, so plan your meetings accordingly.

Experience

- The co-chair who leads the meeting should invite and encourage participation of all members. Each member should feel they have the opportunity to speak.
- INTRODUCTIONS! Always acknowledge new members and ask them to introduce themselves to the group.
- Don't talk *at* your members – talk *with* them. Try to facilitate as much open discussion as possible, in accordance with the agenda, in order to drive member engagement.
- Consider including 15 minutes of a “special experience” for your members. Invite your development staff to talk about making an ask, invite beneficiaries of your program to share their story, or have a quick pitch off. This will keep your members engaged and ultimately become better fundraisers for your cause.

Follow up

- Always end your meeting with action items and send a recap email to the entire group, ideally with a date (and time/location if possible) for your next meeting.

Incorporate 20 minutes of a special experience into your meeting to inspire your associate board members and teach them about your organization. The more you coach them on what you do and how you do it, the better ambassadors they will be! Here are a few ideas to incorporate into your meeting:

- **Mission Moment**

At the beginning of each meeting, ask several members to share why the cause is special to them.

- **Pitch-off**

Have several members give a quick 30 second pitch on your organization. Give them positive and constructive feedback to make it even stronger.

- **Development lesson**

Invite a member of your development team to the meeting to give a quick presentation on how to make a fundraising ask.

- **Impact story**

Invite a beneficiary of your program to talk about how it has made an impact on his or her life. If that's not possible, share a moving story of one of the beneficiaries.

- **Program lessons**

Invite a member of your programs team to talk a little bit about processes or evaluation metrics – how they do what they do!

- **New material highlight**

Share a new program or initiative and explain how this will have a greater impact on the results of your organization.

- **Recap an exciting event**

Recently have a gala or programmatic event? Share some video or photos and talk about the event's success or impact.

- **Financial Review**

Have a member of your finance team talk through your latest 990 report, giving a brief overview of your organizations financial health.

ASSOCIATE BOARD MEETING AGENDA

Wednesday, March 15, 2017
7:00 - 8:15pm

Location:
General Atlantic - 55 East 52nd Street, 32nd floor

Conference Call Number:
(641) 715-3580

Access Code: 99900

7:00 - 7:10

Welcome + New member introductions

Nicole, Co-Chair

7:10 - 7:25

Gala Recap: How did we do?

Russell, Fundraising Chair

Russell will go over highlights. Discussion on *what can we do better next year?*

7:25 - 7:45

Program Lesson: Why and how do we choose the students for our programs

Rob, Program Manager

Rob will review the application process and read an example of a sophomore student's essay

7:45 - 8:10

Events: Fall Planning

Courtney & Alex, Event Chairs

What about a new event for the fall?
Who would like to join the event taskforce?

8:10 - 8:15

Wrap up

Nicole, Co-Chair

Next Meeting: 5/17/2017 7:00-8:00 pm at Citi HQ
(388 Greenwich St., 18th floor, Suite 1200)



An associate board can ignite the potential of this generation to become a driving force for your work and cultivate new leaders for the future.

**Sign up at CariClub.com
to get started today.**

