BOARD FELLOWS PROGRAM MANUAL
FOR MBA SCHOOLS
A Guide to Starting a Board Fellows Program

Caroline Allen CFA, MBA Class of 2007
Amos Tuck School of Business Administration, Dartmouth College

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—Caroline Allen
Fall 2007
TABLE OF CONTENTS

Introduction ........................................................................................................................................5
Program Snapshots ..........................................................................................................................6

CHAPTER I:
The Benefits of a Board Fellows Program

- Benefits to Students ..................................................................................................................13
- Benefits to Organizations ............................................................................................................14
- Benefits to MBA Schools ............................................................................................................15
- Benefits to Local Communities ....................................................................................................15

CHAPTER II:
A Short History of the Board Fellows Program ............................................................................16

CHAPTER III:
Key Decisions about the Program Structure

- Program Mission Statements ......................................................................................................17
- Program Leadership .....................................................................................................................18
  * Managed by Students ..............................................................................................................19
  * Managed by Staff ......................................................................................................................19
  * Hybrid Management Style .....................................................................................................20
  * Recommendations and Best Practices ..................................................................................20
- Program Services .......................................................................................................................20
  * Board Committee Service .....................................................................................................21
  * Board Fellows: One vs. Two ...................................................................................................21
  * Project Deliverable ..................................................................................................................21
  * Recommendations and Best Practices ..................................................................................22
- Students’ Expectations ................................................................................................................23
  * Applications ...........................................................................................................................23
  * Board Participation Requirements .........................................................................................23
  * Deliverables ............................................................................................................................23
  * Training and Workshops .........................................................................................................24
  * Feedback and Monitoring ......................................................................................................24
  * Time Commitment ................................................................................................................24
- Organizations’ Expectations .........................................................................................................24
  * Applications ...........................................................................................................................25
  * Board Participation Requirements .........................................................................................25
  * Mentorship ...............................................................................................................................25
  * Feedback and Monitoring ......................................................................................................26
  * Time Commitment ................................................................................................................26
- Selection of Students ...................................................................................................................26
  * Criteria ....................................................................................................................................26
  * Selection Process ....................................................................................................................27
  * Recommendations and Best Practices ..................................................................................27
Selection of Organizations ................................................................. 27
• Criteria .......................................................................................... 28
• Selection Process .......................................................................... 29
Program Duration ............................................................................. 29
• 7–9 Months’ Service ....................................................................... 29
• 12–15 Months’ Service .................................................................. 30
• Recommendations and Best Practices ............................................. 31
Board Fellows Training ..................................................................... 31
• Information Sessions ....................................................................... 31
• Training Workshops ......................................................................... 32
• Coursework ........................................................................................ 32
• One-on-One Support ......................................................................... 32
• Recommendations and Best Practices ............................................. 33
Academic Credit .................................................................................. 33
• Full Course Credit ............................................................................ 33
• Partial Course Credit ......................................................................... 34
• No Course Credit ............................................................................... 35
Feedback and Monitoring ................................................................. 35
• Check-ins during the Board Fellow’s Term ..................................... 36
• Gathering Feedback at the End of the Board Fellow’s Term .......... 37
• Process for Maintaining Institutional Memory and Records .......... 37
• Periodic Detailed Analysis ............................................................. 38
• Recommendations and Best Practices ............................................. 38
Communication Strategy ................................................................. 39
• Develop the Necessary Documentation ........................................ 39
• Disseminate the Information .......................................................... 40

CHAPTER IV:
Feasibility Analysis and Implementation
Are the MBA students supportive of the program? ...................... 41
• Starting the Program ....................................................................... 41
• Gauging Support ............................................................................. 41
• Takeaways ........................................................................................ 42

Does the MBA school have the resources to support the program? 42
• Starting the Program ....................................................................... 42
• Budgeting .......................................................................................... 42
• Staffing .............................................................................................. 43

Are the local organizations interested in having Board Fellows? .... 43
• Starting the Program ....................................................................... 43
• Gauging Support ............................................................................. 43
• Takeaways ........................................................................................ 43

References .......................................................................................... 44
Appendices .......................................................................................... 51
Board Fellows programs place current MBA students on the boards of local not-for-profit organizations. The students act as non-voting members of the board, serve on committees, and often complete a project for the organization. This service provides not-for-profits with the valuable insights and skills of MBA students while training these students and introducing them to organizational governance and board service.

These programs have been in existence for roughly 10 years, and they have grown and developed tremendously in that time. This manual is first and foremost a guide for setting up a Board Fellows program at an MBA school. It describes the history of and rationale for these programs, as well as their structures and steps to implement them.

In addition to providing a guide to set up new Board Fellows programs, this manual can serve as a best-practices study for existing programs. It provides an opportunity for readers to examine the decisions made in their own program structures in light of what other programs have done.

Optimally, the information in this manual will lead to an even greater expansion and improvement of Board Fellows programs. Information was gathered through a series of interviews and research in June and July of 2007. While every attempt was made to ensure the information contained in this manual is accurate, readers should verify information about individual programs with that particular program.

For general information, please contact:
Patricia Palmiotto
Director, Allwin Initiative for Corporate Citizenship
Tuck School of Business at Dartmouth
tuck.allwin.initiative@dartmouth.edu
Each year, the Fuqua On Board program at Duke’s Fuqua School of Business in North Carolina matches 30–40 Duke MBA students with Durham-area nonprofits to serve as non-voting board members. Over the course of a seven-month apprenticeship during an academic year, pairs of students work closely with a board mentor, participate regularly in board meetings, and serve on a board committee, task force, or project team. Students serve as “board associates,” gaining valuable insight into the governance and inner workings of nonprofit organizations while providing the nonprofits with fresh perspectives and critical business skills. Students and boards should expect a time commitment of 10–12 hours per month. This is an extracurricular volunteer commitment; students do not receive academic credit. Throughout the Fuqua On Board program, students are provided support through workshop training, peer networking sessions, and ongoing coaching as needed from staff and faculty affiliated with the Center for the Advancement of Social Entrepreneurship (CASE). Nonprofit counterparts are invited to many workshops and special events. CASE staff manage the Fuqua On Board program.

How is your program changing?
When Fuqua On Board was launched in 2002, the program was managed by students, the application process was informal, and there was minimal screening of students and nonprofits. Furthermore, expectations were unclear among both the students and the participating nonprofits once matches were made. To provide more continuity and to build longer-term relationships between the nonprofits and the school, the overall management of the program was brought under CASE in 2004. CASE staff work each summer to recruit nonprofits for the next year’s program, screen placements for suitability, and identify potential committee and team assignments. CASE also requires the nonprofit to designate both a staff liaison and a board mentor. Staff interview each student applicant to get a better sense of his/her skills, experience, motivations, and expectations, as well as comfort level with ambiguity. Students submit a progress report each term, and both nonprofits and students complete a year-end evaluation survey.
In the 2006–07 academic year, Fuqua removed the requirement of a formal project and now requires each student to serve on a board committee, task force, or project team. Before the end of the year, students submit a formal report or presentation to include specific recommendations for action. If they wish to undertake a more formal consulting project, they may discuss this with the nonprofit’s staff and board. We have also opened the program to local alumni on a limited basis. Alumni may serve in a capacity similar to students, or they may serve as subject-matter experts and coaches for the student pairs. Finally, to streamline the collection and review of applications, we now have application forms available in an online format via SurveyMonkey.

Harvard Business School Board Fellows Program

The Harvard Business School (HBS) Board Fellows program matches Harvard MBA candidates with the boards of directors of nonprofit organizations for eight-month engagements. Fellows attend board sessions and relevant committee meetings while completing a strategic project for the organization under the mentorship of the executive director or a current board member. Board Fellows work with the board to refine and develop the project scope, target key deliverables, conduct necessary analysis, and, ultimately, prepare recommendations for review.

Here is a sampling of typical projects:

• Marketing: assess community perspectives of organization, align communication strategy with mission, develop/enhance internal communication program
• Strategy: develop a business plan for expanding into new regions/services, evaluate the activities critical to your mission, create a five-year strategic plan
• Board development: evaluate board recruitment and training, strengthen board involvement and diversity, improve board processes and capacity
• Operations: analyze costs and benefits of critical processes, identify potential organization efficiencies, develop a capacity-building plan
How is your program changing?
This past year, HBS Board Fellows recognized that our outreach to Boston-area nonprofits was limited. Student demand for the program far outweighed the supply of nonprofit partners. We have since begun a strategic outreach to organizations that we identified based on their mission, proven community impact, and ability to benefit from the Board Fellows model. The search for organizations was conducted via the Internet, with input from the HBS Social Enterprise Initiative.

Over 50 percent of the organizations contacted have expressed interest, and we hope this translates into broader participation from those that previously were unaware of the program. We also continue to maintain relationships with organizations that have participated in the past.

Additionally, we plan to encourage students to invite a nonprofit with which they already have a relationship or would like to work. We have found these engagements to be very successful in the past, and they enable our program to grow with student-led outreach. The organizations that students recruit are subject to the same application process as all other organizations.

Finally, the Board Fellows leadership team continues to refine the application, interview, and project-scoping processes to ensure the engagements are as successful as possible. We have learned that setting expectations early is key to an enriching, results-oriented experience for both the organization and the Fellow.

Stanford Graduate School of Business Board Fellows Program
Each year, nearly 90 students (about 25 percent of a Stanford Graduate School of Business class) submit applications to serve as Board Fellows for more than 50 nonprofit organizations in the San Francisco Bay Area. From arts and environmental organizations to education and youth programs, Board Fellows’ 10 years of programming have built strong relationships with area nonprofits. Applications are accepted from organizations in September and from students in November. Student applicants are accepted only after mandatory participation in a training
A kickoff celebration in November brings together students and host organizations for the first time. Typically, two Fellows are paired with a host organization and complete either a joint project or separate projects in the spring quarter. Final presentations made to board and staff members generally occur in May or June, and sometimes projects span over the summer. Independent study credit is available for students who desire it.

Four student leaders partner with one staff member to lead the program; student leadership transitions to new students each spring. Program participation has been shown to positively increase students’ participation in the nonprofit sector—including increased tendency toward board service, pro bono consulting, volunteering, and philanthropy—as alumni. Nonprofits cite benefits as well, gaining a new perspective on the board, increased confidence in the board’s decision making, and access to other university resources.

How is your program changing?
Early in the program’s history, one Fellow was matched with one organization. Due to increased student demand and recommendations made in a 2004 in-depth program analysis, organizations are now encouraged to host two Fellows as often as possible. Although the program was not designed as such, many hosts will add one first-year MBA student each year and invite the rising second-year student to continue with the fellowship, producing a two-year opportunity for both Fellows and an easy transition for both the host organization and the students. Instituting this as a component at the program’s outset might have prevented unclear expectations and rough transitions that some organizations felt from one year to the next. Additionally, we’ve learned strengthening a program doesn’t always mean growing to meet student or organizational demand. Sometimes, the key to successful experiences is to maintain a high bar so that only truly committed and passionate students are selected to work with only those organizations that can provide high-quality mentorship and project opportunities. Programs should avoid lowering the bar for student or board requirements in order to build program size; rather, they should build lasting relationships with boards that can provide a high-quality experience for every student year after year, even if it means slower growth for the program overall.

Recently, the program has begun to more fully implement a hybrid management model, starting with giving students responsibility for managing the relationship with host organizations. This year, students created a complex matching tool to help sort through potential Fellows’ match preferences.
Tuck Board Fellows Program

The Tuck School of Business and nonprofit organizations in the Hanover, N.H., area partner to place 10 percent of each Tuck MBA class on local nonprofit boards. Students apply in the winter of their first year and begin board work the following spring term, continuing through their second year. The relationships between the student Fellows and the 15 nonprofits differ, but all Fellows attend board meetings and serve on committees. Some complete special projects. The program is cocurricular, with the option for students to obtain academic credit as an independent study or as part of an elective course on social entrepreneurship. Students and the nonprofits function independently, with organizational and financial support from the faculty and staff of the Allwin Initiative for Corporate Citizenship. The Initiative’s overall goals are to strengthen local nonprofits and encourage MBAs to continue their involvement with the nonprofit sector as alumni.

How is your program changing?

The program started informally years ago as a match between an interested student and an agency. There was no application process. Although it seemed like a good idea at the time to be hands-off, this proved to be too informal and, as a result, the relationship gradually fell apart. The program now has a formal application process. Expectations are clear, and there is support for both students and agencies through regularly scheduled group meetings and individual conversations. A formal review of the program was conducted after a stage of tremendous growth. The review outlined practices we should continue and recommended changes that will strengthen the experience for students. We will conduct a thorough review every few years to ensure the program is meeting the needs of both students and agencies and functioning at its best.

Each month, students have the opportunity to lunch with a Tuck faculty member who has expertise in nonprofit management. These informal discussion sessions are not required, but they do give Fellows time to discuss what they are learning and share insights with each other. These conversations have helped Fellows learn how various nonprofits function, illustrated different governance models, and helped deal with misunder-
standings and mismatched expectations before they became serious problems. Previous Fellows have recommended that each student have a special project to complete as a board member to provide a focus and a specific way in which they can contribute to the agency. We endorse this recommendation and, in our introductory session, share examples of previous project work that has been done.

Wharton’s Non-Profit Board Leadership Program

The Non-Profit Board Leadership Program (NPBLP) at the Wharton School was launched in the spring of 2005 with the goal of creating an experiential learning environment for students that would also support local nonprofits. To achieve this goal, the NPBLP places second-year MBAs on boards of local nonprofit organizations in order to create a mutually beneficial experience for both the student and the nonprofit. Participating students are given the title of “visiting board member” and are staffed on committees of respective boards which focus on particular strategic areas for each organization (e.g., accounting, finance, marketing, etc.). The NPBLP is a student-run program, with institutional support from the Wharton Leadership Program. The program is rooted in a commitment to serving the long-term needs of nonprofit organizations in the Philadelphia area. Together, it is envisioned that both Wharton and local nonprofits can help each other succeed and achieve a rich understanding of the growing intersection between business and nonprofit activities.

How is your program changing?

In the past, the NPBLP has contracted with external organizations to match visiting board members with local nonprofits. We have found that the matching process has been more efficient and cost effective as an in-house effort, while strengthening our relationships with our partnering nonprofits. In addition, we have learned that it is best to closely monitor the progress that students are making with their nonprofits, while also allowing each participant to be responsible for his or her own experience. We do this through regular check-ins with both the students and the organizations. Finally, because students do not receive course credit for participating in NPBLP, we realized that we needed to find other ways to inspire commitment in participants. We do this through requiring each student to sign a commitment letter, meeting with them regularly, and by soliciting feedback from nonprofits.
In late 2006, the NPBLP made the exciting transition to become part of the Wharton Leadership Program. NPBLP will continue to be a student-run initiative but will be able to leverage the infrastructure, administrative support, and wealth of experience and knowledge in leadership development and training from the Leadership Program. We also have added an interview with the NPBLP Executive Board/Leadership Program as part of the application process for Wharton students to serve as visiting board members, in addition to the written application. As student interest has increased in the program and applications have outnumbered available slots, the interview component has served as an important component to help determine which students are ideal candidates for the program.

Yale School of Management Board Service Club

The Board Service Club introduces Yale School of Management second-year students to the complexities of serving on nonprofit boards. Each club member serves as a non-voting member on the board of a nonprofit organization for an academic year. In the course of their tenure, students may shadow a board member, sit on various board committees, and complete projects for the board. Past projects have included development of programmatic evaluation metrics, social-impact assessment, strategic planning, and creation of a board manual.

How is your program changing?

There is a perennial problem with nonprofits misunderstanding the Board Service Club as an internship, which we believe happens because of an overemphasis on the project. We have reworded our outreach materials to talk about the program as a learning opportunity for students, and we will encourage projects that focus on governance issues rather than more traditional consulting projects.

This year, the Board Service Club and the two other student clubs that work with local nonprofits—Community Service and SOM Outreach (pro bono consulting by first-year students)—have joined forces in the recruiting process for nonprofits, sending out a joint letter and an application that outline each of the club’s services. The aim is to conceive of the programs as a two-year continuum, with students forming relationships with nonprofits in their first year in SOM Outreach and continuing that relationship in their second year through Board Service.
The Benefits of a Board Fellows Program

The not-for-profit sector has grown tremendously in the last 20 years. Nonprofit organizations are tackling society’s most challenging problems and working to improve our world in every corner of society—from medicine and social services to greener technologies and the arts. Within this expansion, a need has been created for business skills in, but certainly not limited to, marketing, finance, and strategy.

MBA students are uniquely qualified to contribute this expertise both during their academic studies and after graduation as business leaders. With more than 100,000 students graduating with an MBA per year, as noted by the U.S. Department of Education in 2000–01, there is a wealth of skills and knowledge available. Combining the talents of MBA students with the growing number of not-for-profit organizations lends itself to a powerful collaboration that benefits both parties.

This section describes how the Board Fellows programs can have a profound impact on the participating students, organizations, and MBA schools, and the communities they serve.

Benefits to Students

Board service provides a way for traditional MBA students to have an impact on the not-for-profit sector while still pursuing full-time consulting, finance, or general-management careers. It also provides valuable skill development for students interested in full-time public and not-for-profit service. Some of the opportunities for students include the following:

• gaining an in-depth understanding of the role of business leaders on nonprofit boards
• offering a high-impact way for students to serve their communities using their business knowledge
• developing the skills for effective and thoughtful community leadership
• providing real-world environments to further develop business and communication skills
• partnering with experienced mentors
• integrating tools learned in the classroom with real-world application
• developing the professional knowledge and skill in board governance that facilitates future board service
• practicing how to manage and complete a consulting project
I think the Tuck Board Fellows program is fantastic because it allows students to gain knowledge and exposure to board governance and the inner workings of nonprofit organizations while, at the same time, allowing them to utilize their learning from the classroom for a wonderful cause.

—2006–07 Tuck Board Fellow

The Board Fellows experience has given me great exposure to nonprofit management in a well-run organization. The training is great, and the structure of the program allows you to think and learn about the nonprofit business model from real experts in the field.

—2006–07 HBS Board Fellow

Benefits to Organizations
The Board Fellows programs provide a way for resource-constrained organizations to access valuable business skills and fresh insights. While the program does require a significant investment by the organization, the high number of those who repeat the program suggests participating organizations are pleased with the return on their investment. Some of the benefits for organizations include the following:

• gaining access to talented business leaders with fresh and innovative ideas and providing new perspective and input to board decisions
• developing a relationship with potential candidates for future board and staff positions
• participating in development of future community leaders
• networking with other not-for-profits through the MBA school
• strengthening relationships with the MBA school and perhaps utilizing its other not-for-profit services
• obtaining access to students’ knowledge and skills in a project that benefits the organization

The Board Fellows program reveals Stanford University’s commitment to creating sustained social solutions within our communities. The character, skill, and passion of our Board Fellow were tremendous gifts to our foundation.

—Cynthia King-Guffey, Executive Director, Thrive Foundation for Youth
The Board Fellows program has been an incredible benefit for our organization. We’ve received access to knowledge, expertise, and time that we haven’t been able to find through other avenues. The dedication and work the students have performed on the various projects over the years has been practically priceless. I highly recommend this program.

—Loretta Gallegos, Former Executive Director, Rebuilding Together Peninsula

Benefits to MBA Schools
Board Fellows programs offer one way for MBA programs to demonstrate how their students are using their skills and talents to improve our world. Not only does this enhance the relationship between the MBA school and the local community, these programs also can help attract prospective students who are interested in social change.

Students who participated in the Board Fellows program may be more likely and better equipped as alumni to serve effectively on not-for-profit boards. For example, at any given time, more than one-third of Harvard Business School alumni are actively serving on nonprofit boards. Their involvement in nonprofit governance tends to increase as their careers progress, with the highest rates of nonprofit board service (approximately 50 percent) occurring among those who graduated 25 to 40 years ago. Board Fellows programs may encourage alumni to become involved with nonprofits earlier in their careers. As one Tuck MBA remarked at the end of a year of board service, “I will definitely serve on other boards, but I will choose the boards carefully.”

Benefits to Local Communities
An infusion of MBA skills in the not-for-profit sector is a boon for the local community. Since most of the Board Fellows programs focus on local organizations, the benefits of the program flow directly to the whole community. Instead of these talented students passing directly to the community, the Board Fellows program helps them engage and give back to the local area in a meaningful way.
A Short History of the Board Fellows Program

The first Board Fellows program was founded in 1997 by six MBA students at the Stanford Graduate School of Business. The program was such a novel idea that not-for-profits did not immediately understand its potential impact. The students used the offering of a project, still a part of Stanford’s program today, to entice organizations to host a Fellow and were very selective about the students who were placed with those organizations. These founding students viewed delivering a quality experience as a higher priority than growth.

As Stanford’s program grew, new Board Fellows programs sprouted across the nation. Haas School of Business at the University of California, Berkeley, began its program in 2000, followed by Northwestern University’s Kellogg School of Management, the Stephen M. Ross School of Business at the University of Michigan, and Duke’s Fuqua in 2002. By the end of 2007, there were more than 10 U.S. Board Fellows programs serving over 250 not-for-profit organizations. The MBA schools hosting the programs include the following:

- Columbia Business School, Columbia University
- Fuqua School of Business, Duke University
- Haas School of Business, University of California, Berkeley
- Harvard Business School, Harvard University
- Kellogg School of Management, Northwestern University
- McDonough School of Business, Georgetown University
- Michael G. Foster School of Business, University of Washington
- Ross School of Business, University of Michigan
- Stanford Graduate School of Business, Stanford University
- Tuck School of Business, Dartmouth College
- Wharton School, University of Pennsylvania
- Yale School of Management, Yale University
Key Decisions about the Program Structure

Designing a Board Fellows program involves many decisions. This chapter will move through the key components of a Board Fellows program using a series of questions. Each section of the chapter provides information about what current programs are doing, and many offer recommendations and best-practice suggestions.

Program Mission Statements

Decision: What are the overall goals of the program?
A new program may benefit from creating a mission statement. These statements summarize a program’s vision and purpose and can be used to guide decision making, but as the program grows and changes over time, they may need to be adjusted. Below are some sample mission statements from current programs:

**Harvard**
Our mission is twofold: (1) provide Harvard MBAs with valuable community leadership development through placement as non-voting members on nonprofit boards and (2) provide MBA talent to advance critical projects for nonprofit organizations.

**Kellogg**
The mission of the Kellogg Board Fellows program is to
- prepare Kellogg students and alumni to be civic leaders by being effective nonprofit board members
- support nonprofits by applying Fellows’ business skills to strategic, organizational, and operational issues
- build Kellogg’s reputation of producing strong, community-oriented leaders

**Stanford**
Our mission is to prepare Stanford MBAs for responsible community leadership by providing quality apprenticeships with the Bay Area’s nonprofit boards.

**Wharton**
- Leverage the intellectual capital and experience within the Wharton MBA program to bring business skills and ideas to the Philadelphia nonprofit community.
- Educate and provide exposure to MBA students in the world of nonprofits, leading to a lifelong interest in community service.
- Enhance Wharton’s brand as a program which caters to non-traditional business interests.
• Enrich Wharton’s leadership development program by providing MBA students with the unique, hands-on experience of serving on a nonprofit board.
• Be a highly sought-after resource for Philadelphia nonprofits in finding new talent and innovative ideas.

Program Leadership

Decision: Who will manage the program?

A successful Board Fellows program requires effective communication and coordination among MBA students, interested organizations, and the MBA school staff. To tackle this challenge, each Board Fellows program must delineate the responsibilities and decision-making processes between the MBA program staff and the MBA students.

The program must determine who will be responsible for
• recruiting and maintaining relationships with the organizations
• recruiting and maintaining relationships with the students
• selecting and matching Board Fellows with organizations
• scheduling training sessions and workshops for Board Fellows
• creating and managing a knowledge database
• designing and overseeing evaluation and feedback mechanisms

There are several models being used by MBA schools, each with varying degrees of student and staff involvement. There is no one “right” model; each has its own pros and cons. The most predominant model for managing Board Fellows programs is a hybrid of student and staff leadership, but even within this category there are variations.

Historically, Board Fellows programs were started and operated by students. Then, after the program had been in place for two to four years, it would transition to a hybrid model as continuity and institutional memory issues arose. Maintaining the critical relationships with local organizations can be challenging with a student body that changes every two years.

Since staff members typically have a longer tenure than students, they have an opportunity to build stronger relationships with the organizations and gain a deeper understanding of the organizations’ needs.
**MANAGED BY STUDENTS**

*Description:* Students are responsible for all aspects of the program. They may use MBA school staff as they develop an organization contact list or as a resource for students with questions, but the staff act only in a supporting role. Yale is an example of a student-run program.

There are many different ways students can choose to divide the leadership responsibilities, depending on the size of the program. A key distinction between management by students and the hybrid management style is that in the former, the students assume responsibility for recruiting organizations and managing those relationships. As described earlier, most programs have moved towards a hybrid model to address relationship continuity issues.

<table>
<thead>
<tr>
<th>MANAGED BY STUDENTS</th>
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<tbody>
<tr>
<td><strong>Pros</strong></td>
</tr>
<tr>
<td>• students guide the direction of the program</td>
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<tr>
<td>• closest interaction between the students and organizations since students are responsible for all aspects of the program</td>
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<tr>
<td>• creates an opportunity for student leaders to hone their skills</td>
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<tr>
<td><strong>Cons</strong></td>
</tr>
<tr>
<td>• maintaining and building relationships with organizations with an ever-changing student population is difficult</td>
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<tr>
<td>• hard to develop and pass along institutional memory</td>
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<tr>
<td>• can lead to duplication of efforts by students and confusion for organizations as different clubs reach out to the same organizations (e.g., non-profit consulting clubs, volunteer clubs, as well as Board Fellows)</td>
</tr>
</tbody>
</table>

**MANAGED BY STAFF**

*Description:* MBA staff members are responsible for most aspects of the program. In addition to maintaining the relationships with organizations, they select and match Board Fellows to organizations and schedule training events. Students apply and serve in the Board Fellows program but are not involved in managing it. Tuck is an example of this style.

<table>
<thead>
<tr>
<th>MANAGED BY STAFF</th>
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<tbody>
<tr>
<td><strong>Pros</strong></td>
</tr>
<tr>
<td>• since staff members tend to have longer tenure than students, they are able to develop deeper relationships with organizations</td>
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<tr>
<td>• easier to obtain and pass along institutional memory</td>
</tr>
<tr>
<td><strong>Cons</strong></td>
</tr>
<tr>
<td>• program could become disconnected from students and not adapt to changing student interests</td>
</tr>
<tr>
<td>• managing the program is time consuming; could require additional staff</td>
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</tbody>
</table>
HYBRID MANAGEMENT STYLE

Description: MBA staff members and students share management responsibilities. Communication between both groups is critical. Each group must identify its responsibilities. A model template of a Board Fellows hybrid management model, proposed in a 2004 study of Stanford’s program, is shown below.

<table>
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<tr>
<th>PROS</th>
<th>CONS</th>
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<tbody>
<tr>
<td>• staff typically has responsibility for relationships with organizations, creating continuity</td>
<td>• communication and coordination can be difficult with more people involved</td>
</tr>
<tr>
<td>• students are still able to determine the direction of the program</td>
<td>• matching students to organizations may be difficult for student leaders to do since they may not maintain the organization relationships</td>
</tr>
<tr>
<td>• less burden on both students and staff since management efforts are shared</td>
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RECOMMENDATIONS AND BEST PRACTICES

Most Board Fellows programs seem to be transitioning to a hybrid management model to address continuity and institutional memory issues.

- Students must be intimately involved from the beginning. Without their commitment and support, the program will not succeed.
- Staff members are generally in the best position to maintain organization relationships.
- Staff members can coordinate recruiting organizations for the Board Fellows program with other service-oriented MBA programs.

Program Services

Decision: What services will the program offer to organizations?

Each program has to determine how it can best serve its MBA students and local organizations. It is important to consider not just the services a program should provide, but those it can provide excellently. As a significant link between organizations and MBA schools, providing quality services is critical. Failure here can have negative spillover effects for other programs (and vice versa).
While all programs offer non-voting board participation to the organizations, they vary in the degree to which they encourage board committee service, the number of Board Fellows they staff to each organization, and whether they require Fellows to complete a project.

The original program at Stanford offered Board Fellows as non-voting board members, encouraged committee participation, and required the students to complete a project for the organization. Today’s programs across the country are similar, although some Board Fellows programs do not require projects and many are staffing two Fellows to each organization.

BOARD COMMITTEE SERVICE
Board and committee participation are the essential services Board Fellows provide. While all programs include it, not all emphasize the same degree of committee participation. Program feedback suggests that serving on committees helps students integrate into the organization and gives them another opportunity to contribute. For these reasons, programs are requiring Board Fellows to serve on committees as part of their board service.

BOARD FELLOWS: ONE VS. TWO
As programs grow in size, they increasingly are staffing two students at each organization. While it is sometimes possible to staff only one person at an organization, program feedback suggests both the students and organizations prefer two for the following reasons:

* Students can collaborate with each other.
* Organizations get another student’s input with roughly the same amount of effort on their part (“two for the price of one”).
* More students can be placed without necessarily increasing the number of organization relationships.
* Integration into the organization is eased because students have a partner.
* In programs where one Board Fellow is a second-year and one is a first-year, a mentorship can develop.
* Students can hold each other accountable, including meeting attendance and project completion.

PROJECT DELIVERABLE
Description: Many, although not all, programs require students to complete a project as part of their board service. Organizations cite projects as among the most valuable contributions of Board Fellows, but projects are challenging to manage.
Some examples of past projects include the following:

- interviewing board members for a board effectiveness audit
- segmenting an organization’s donor base and analyzing current fund-raising efforts to increase donations
- benchmarking the marketing activities of similar nonprofits around the country to understand best practices
- developing a strategic planning process for the organization
- developing a survey tool to understand customer satisfaction and needs
- building a financial model to improve planning and tracking costs
- developing the pros and cons of creating a for-profit subsidiary

### Project Deliverable

<table>
<thead>
<tr>
<th>Pros</th>
<th>Cons</th>
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</thead>
<tbody>
<tr>
<td>• projects can provide valuable knowledge and service to organizations</td>
<td>• managing the scope of the project can be difficult</td>
</tr>
<tr>
<td>• students are able to apply their MBA skills in a real-world environment</td>
<td>• little oversight can lead to projects getting off track</td>
</tr>
<tr>
<td>• students engage more deeply with the organization</td>
<td>• setting appropriate expectations with the organization can be challenging</td>
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<tr>
<td></td>
<td>• can take the focus away from board-service training and turn it into a consulting engagement</td>
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</table>

### Recommendations and Best Practices

Staffing two Board Fellows instead of one at each organization is recommended when possible, and placing Board Fellows on at least one committee aids in board integration.

Additionally, here are some project-management recommendations for a program that has the resources to support quality project deliverables:

- Work with the organization to define the project goals and parameters early in the Board Fellow cycle. If the project is vaguely defined or ill suited for a Board Fellow, it tends to result in a bad experience for both students and the organizations.
- Check in with Board Fellows periodically about project deliverables.
- Have Board Fellows present the project to the board and/or other Board Fellows at the end of the year. The expectation of a presentation can create more commitment and accountability from both parties and aid in knowledge transfer.
- Catalog the project deliverables for future students’ reference. (Be aware of confidentiality issues with organizations before doing this.)
Students’ Expectations

Decision: What will the program expect of its Board Fellows?

To deliver the services offered by the Board Fellows program, the program must communicate its expectations clearly to the MBA student body.

Components of these expectations include

• applications
• board participation requirements
• deliverables
• training and workshops
• feedback and monitoring
• time commitment

Applications

All programs require students to complete a written application. Some programs interview applicants as well. (For examples of Board Fellows student applications, see Appendix 1.) The application should be easily accessible for students (online is recommended), and all deadlines should be clearly posted. Programs should explain their selection and matching criteria to students. (For more on selection and matching, see page 26, “Selection of Students”)

Board Participation Requirements

Students are expected to attend all board meetings as well as meetings of any committee(s) on which they serve. Since conflicts or emergencies might occasionally prevent attendance, programs need a process for students to follow in these instances. Programs should also clarify what is a permissible absence and should have a clear policy regarding how classes and Board Fellows’ participation should be prioritized.

Stanford offers students the following advice regarding scheduling conflicts:

• Give advance notice of an absence to the board (and perhaps the Board Fellows program leader[s]).
• Try to attend by phone.
• Follow up with your board mentor to learn what was missed.
• Work with professors to address class conflicts.

Deliverables

Deliverables typically come in two forms: projects and presentations. If a project is required, students and organizations need to agree upon a project timeline and outline so both parties understand what is expected
of them. The final deliverables also need to be specified; often, these include a final presentation and/or final written report to the board. Some programs also require Board Fellows to present their projects to the other Board Fellows. If no project is required, programs might require a final presentation about the Board Fellow’s experience.

**Training and Workshops**

Most programs require students to complete preparatory training as well as some workshops or additional training throughout the year. These training requirements need to be communicated to students and scheduled as early as possible to avoid scheduling conflicts. (For more on training and workshops, see page 31, “Board Fellows Training.”)

**Feedback and Monitoring**

Board Fellows may need to participate in periodic check-ins and provide detailed feedback at the end of the program. These expectations should be clearly communicated to the students. Consequences for not meeting specified Board Fellows requirements should also be described. (For more on feedback and monitoring systems, see page 35, “Feedback and Monitoring.”)

**Time Commitment**

Most programs estimate the board-service time commitment at 2–4 hours per week. Projects are typically expected to take 30–40 hours of work.

It is very important that Board Fellows realize these are just averages. Total time, as well as time per week, may vary substantially. Project work tends to be lighter in the beginning of the board service and heavier near the end, often at the same time as MBA finals. Board Fellows should be aware of this and plan their project work accordingly.

**Organizations’ Expectations**

*Decision: What will the program expect of its participating organizations?*

To deliver the services offered by the Board Fellows program, the participating organizations must support their students’ development and learning goals by providing exposure to a not-for-profit board. Organizations should be educated about what a Board Fellow can provide as well as the investment necessary on their part.

Components of these expectations include

- applications
- board participation requirements

Chapter III: Key Decisions about the Program Structure
• mentorship
• feedback and monitoring
• time commitment

APPLICATIONS
Organizations should complete a written application to be considered for the Board Fellows program. (For examples of organization Board Fellows applications, see Appendix 2.) Since these relationships are so important, program leaders should also try to meet with representatives of the organization to discuss the program and its fit with the organization. If a meeting isn’t possible, program leaders and organization reps should at least converse by phone. Organizations that are not selected should be informed as to why not.

Some Board Fellows programs invite organizations to participate in the student matching process. (For more on selecting organizations, see page 27, “Selection of Organizations.”)

BOARD PARTICIPATION REQUIREMENTS
Organizations must be prepared to integrate Board Fellows into their board. In addition to expecting students to attend full board meetings, they should choose at least one committee on which the Board Fellows can serve. Board and committee meetings should be scheduled and communicated to students as early as possible and be well attended by the other board members.

MENTORSHIP
Selecting a mentor for the Board Fellow is one of the most critical aspects of the program. This mentor will guide the Board Fellow through his or her participation on the board, act as a resource for questions about the organization, and educate the Board Fellow about board service. Some programs require two mentors: a board member and a staff member at the organization, most often the executive director.

Key characteristics for mentors include
• established and experienced board member
• familiarity with the organization
• interested in working with a Board Fellow
• good communicator
• able to commit the necessary time to helping the Board Fellow
• reliable
• regular attendee at board meetings
FEEDBACK AND MONITORING
The program’s organization relationship manager will need to contact the organization periodically to obtain feedback and monitor the Board Fellows program. Organizations should be aware that active participation with the Board Fellows program is necessary to ensure that the best service is provided and that the program continues to evolve and improve. The organization should also designate a contact person to convey any displeasure with how the experience is unfolding.

TIME COMMITMENT
The most significant time commitment will be by the mentor to the Board Fellow. The mentor should anticipate one to two hours per week; perhaps more if there is a project involved. Additionally, the organization’s annual application and communication with the Board Fellow and program management will take roughly a half-hour per week.

Selection of Students

Decision: How will Board Fellows be selected?
Many Board Fellows programs are in the position of having more qualified and interested students than Board Fellow positions. In this situation, a process must be put in place to determine which students should be appointed as Board Fellows and the organizations to which they will be matched.

Even in instances where there are more positions than student applicants, scrutiny of applicants is necessary to maintain a high-quality program.

CRITERIA
There is no required or preferred background for board service. Everyone—from investment bankers to consultants, entrepreneurs to general managers—can offer valuable insights and skills to the board. Students should have completed or be completing their first-year MBA coursework and be in good academic standing.

What seems to be most important when selecting Board Fellows is assessing their commitment and passion for serving as a nonprofit board member. Eager MBA students, especially those in their first year, have a tendency to overcommit. A thorough application process can help identify students who have both the commitment and the time to meet program demands.
In summary, programs should look for the following student characteristics:

- diversity of backgrounds, work experience, and perspectives
- completed or completing first-year MBA coursework in good academic standing
- commitment to the program and ability to offer required time to it
- fulfillment of any pre-program requirements (e.g., required coursework, Board Fellows–specific training)
- interest in board-service work
- interest in a cause (many programs try to match based on this)
- good communication skills

Selection Process

This process is critical in assessing the interest and commitment of a student applicant. There are generally two parts to the selection process: a written application and an interview. While all programs have a written application, they do not all require an interview. Past leaders have mentioned that answers to questions about why a student wants to be a Board Fellow and what he or she hopes to accomplish through the program have been very helpful in assessing students’ commitment. (For examples of Board Fellows student applications, see Appendix 1.)

For program managers with the time and resources, an interview can be another great way to gauge a student’s interest and fit in the program. Some programs involve the organization in the selection process, allowing it to choose among several qualified students by reading the students’ written applications or interviewing the students or both.

Recommendations and Best Practices

There does not seem to be one right model for selecting Board Fellows, whether it's through a written application, interview, or organization involvement, or some combination of those three. Determining which students have the requisite skills and are willing to commit to the program is critical. In addition to the written applications and interviews, requiring training and information sessions or coursework can help a program determine which students are most committed.

Selection of Organizations

**Decision: How will organizations be selected for the Board Fellows program?**

The Board Fellows program does not offer “free” labor to organizations. Organizations must be willing to invest time and effort in the program to receive a benefit from it. The application and selection process can help program leaders determine which organizations will make good
partners. Once good organizational partners are identified, program leaders should focus on building that relationship to maintain participation in subsequent years.

**Criteria**
The key characteristic to look for in organizations, as in students, is commitment to the program. Each MBA school also needs to decide what types of organizations it wants to include in the program.

*Organization life-cycle stage.* Most programs focus on mature or established organizations because they tend to have regular board meetings, offering Board Fellows important experience in board governance. Some programs want to allow interested students to help startup organizations or those experiencing fast growth. If a school decides to include these less-established organizations, it should select for them only Board Fellows who have experience in these types of organizations or are very knowledgeable and passionate about the cause.

*Type of organization.* The original Board Fellows program focused on local not-for-profit organizations. While most programs have followed this model, some are considering including for-profit firms that, for instance, focus on environmentally friendly operations or profess other missions that are congruent with an MBA school’s social-enterprise group. Additionally, existing programs are discussing whether they want to continue to focus locally or expand to a wider geographic area.

*Organization budget.* One easy way to segment organizations is by budget size. Most programs focus on larger organizations but, as mentioned, others are willing to staff Board Fellows at startups. For programs that want to focus on more-established organizations, a minimum organization budget number should be set as a guideline. A common minimum annual budget is $100,000.

In summary, programs should look for the following organization characteristics:

* diversity of missions (e.g., the arts, environment, social welfare, etc.)
* diversity of organization size
* willing mentors
* regularly scheduled board and committee meetings, preferably monthly (very important)
* commitment to the program and ability to offer required time to it
* interest in working with a Board Fellow and understanding of what the student offers
• passion for the organization’s mission
• good communication skills
• reliability

**Selection Process**

Organizations are required to fill out a written application each year. (For example application forms, see Appendix 2.) It is generally necessary to discuss the Board Fellows program with the organization as well. This may be seen explicitly as an interview or it may just be a discussion that a Board Fellows program leader has when pitching the program to the organization. If it is not possible to converse in person, a phone interview is an option. If an organization is not selected for the program, it should be provided with an explanation. In some cases, organization and student demands may not match, in which case, the program can either assign two or more Fellows to each board or decline the participation of “unmatched” organizations.

**Program Duration**

*Decision: What should be the duration of the program?*

Programs must strike a balance when determining the length of time a student will serve as a Board Fellow. Longer service terms give students more opportunities to learn and become involved with the organization. However, service terms that are too long could dissuade students from signing up. Board Fellows programs that span 7–15 months seem to have found a balance. These service terms give the organizations and the students enough time to connect and contribute to each other without asking for too much of an up-front commitment from either party.

There are several different duration models in use today, each with pluses and minuses. The programs are bifurcated into two types: those that run less than one year, with predominantly first-year-student Board Fellows, and those that run 12–15 months, with predominately second-year-student Board Fellows.

**7–9 Months’ Service**

*Description:* Students apply for the Board Fellows program within the first couple months of matriculating at the MBA school. Matching and initial training occur in September–November. The service term runs until April–June. Both Harvard and Fuqua have this length of service.
**12–15 Months’ Service**

*Description:* Students apply for the Board Fellows program after their first or second MBA term. Matching and initial training occur March–June. Many programs use the spring term as a time to transition because the previous year’s Board Fellows are available and the spring term tends to be less hectic for students. The service term runs 12–15 months, typically ending April–June. The University of Michigan has a 12-month program that runs from January through December but can be extended to May if the organization approves. Both Tuck and Kellogg have a 12–15 month length of service.

<table>
<thead>
<tr>
<th>Pros</th>
<th>Cons</th>
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<tbody>
<tr>
<td>• longer term allows students to really get to know the organization and provides more opportunities for them to give back&lt;br&gt;• students have developed a broader skill set from their MBA coursework&lt;br&gt;• second-years tend to have a better sense of time commitment and are less likely to overcommit&lt;br&gt;• greater than 12 months’ service allows for overlap between the current Board Fellows and new Board Fellows, a valuable transition tool&lt;br&gt;• if a project is required, allows time for a quality output</td>
<td>• longer term requires a greater up-front commitment from students&lt;br&gt;• students may have other club leadership positions in their second year and not be willing to participate&lt;br&gt;• students can only serve one term</td>
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RECOMMENDATIONS AND BEST PRACTICES
Regardless of which service term is chosen, it is important to think about the students’ academic calendars. When does orientation end? When are finals and midterms? When is recruiting at its heaviest? When are students’ schedules less busy? These issues have led some programs to push back the start of the Board Fellows service term to avoid the intensive fall core experience at most MBA schools. Others have moved their programs’ end dates forward to avoid spring finals and graduation.

Since MBAs are known for their ability to manage time, there is no “right” timeline, but being cognizant of the academic calendar is a proactive measure that can improve the quality of the student output and increase the number of students interested in participating.

Board Fellows Training
Decision: How will Board Fellows prepare for their board service?
Developing a training program for the Board Fellows program is one of the most challenging as well as most valuable aspects of the program. The training provided helps students not only with their Board Fellows service but also in their careers if they choose to serve again on not-for-profit boards. Required training can also serve as a sorting mechanism to determine which students are really committed to the Board Fellows program.

MBA schools have an amazing array of resources for training Board Fellows, from faculty and alumni to local experts. Among the various Board Fellows programs there are a variety of training formats, including coursework, workshops, and peer-to-peer networking. (For an example of a Board Fellows annual calendar, see Appendix 3.)

Components of this training include
• information sessions
• training workshops
• coursework
• one-on-one support
• peer-to-peer networking
• MBA program faculty and staff

INFORMATION SESSIONS
Setting appropriate expectations is important in attracting the right students to the Board Fellows programs. Information sessions are an effective way to accomplish this. In addition to laying out the expectations of students (discussed on page 23, “Students’ Expectations”), previous
Board Fellows can present their experiences and answer questions. Some programs make attendance at these sessions a requirement for Board Fellows’ participation.

**TRAINING WORKSHOPS**

Almost all Board Fellows programs have training workshops. Most offer one or two sessions before a student’s service begins. Programs use a variety of people to lead these sessions: faculty, alumni serving on not-for-profit boards, Board Fellows program staff, and local experts (e.g., leaders or board members of not-for-profits). The formats vary based on the presenter, but many include PowerPoint presentations and case studies. Training topics might include the role of the not-for-profit board of directors, how committees function, the ways in which one can develop a positive mentoring relationship, or a primer on consulting-project management.

A few programs also offer training sessions during the students’ board service. While more training is beneficial, once students are involved with their boards and projects, they seem to desire more one-on-one assistance.

**COURSEWORK**

Requiring relevant coursework can be a great way to prepare students for the Board Fellows program. Kellogg has an established course that it requires students to take before serving as a Board Fellow. While many programs express interest in designing a course, it takes an interested and qualified faculty member and an administrative investment to add a class to the school’s offerings. The program would also need enough students to support the class.

**ONE-ON-ONE SUPPORT**

Once students have started their board service, there seems to be a greater desire for one-on-one support. Two effective ways to provide this assistance are:

*Peer-to-peer networking.* This enables students to share learning and support each other. It also builds the Board Fellows network. It most often is arranged as a brown bag lunch or breakfast event, where students can mingle and talk with each other. Students may be asked to present briefly the organization they are working with and any issues they are facing.
MBA program faculty and staff support. This is a great resource for students who are looking for guidance or who have an issue with the organization they are serving. Staff can also maintain a list of resources (see “References” section). Generally, this is not designed as a set time or program; students know they can stop by or arrange a meeting whenever necessary. Some programs require one or two of these one-on-one sessions as a check-in during the students’ board service. Tuck offers monthly lunch discussions with a faculty member for all Board Fellows.

Recommendations and Best Practices
MBA programs have a wealth of resources to tap. In terms of training programs, it’s all about the people; find the most dynamic and qualified people to lead the training sessions and fit the format to them. Students want an engaging session, not necessarily a particular training format. And, remember, quantity does not beat quality.

Academic Credit
Decision: Can students earn academic credit for their board service?
Earning academic credit for Board Fellows service often has been a topic of discussion at MBA schools. Current programs offer varying options. Some offer full credit for board service as part of a course. Others offer half-credit for project work, while keeping the board service voluntary. There is also the model of keeping the programs totally extracurricular.

Most programs have chosen to keep the entire program voluntary, often as a result of student input. This decision can also be an issue of size and resources. Faculty and MBA administrators often have enough responsibilities to keep them occupied without additional tasks. Some programs do not have enough students participating to constitute their own class.

Full Course Credit
Description: Students earn a full course credit for their Board Fellows service. Typically, this involves a course as part of their Board Fellows service. The course will have a reading list, class sessions led by a faculty member, case studies, and, often, visiting speakers involved in nonprofit boards. Kellogg offers a full-credit course.
### Partial Course Credit

**Description:** This option typically applies to Board Fellows programs with a project component. Students earn a partial course credit for completing a project during their Board Fellows service, often structured as an independent study. Students find a faculty advisor, and the projects generally must be more in-depth than the average Board Fellows project to warrant credit. It is usually the students’ prerogative to pursue this option. Both Stanford and Tuck offer partial credit as part of other courses.

<table>
<thead>
<tr>
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<th>Cons</th>
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<tbody>
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<td>• students who wanted to take other courses may decide not to participate</td>
</tr>
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<td>• can lead to more nonprofit-focused students participating and fewer students focused on finance, consulting, general management, etc.</td>
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<td>• students are better prepared for board service</td>
<td>• may overstretch faculty and/or administration</td>
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<td>• since students are in class together, there are more opportunities for them to reach out to each other</td>
<td>• board service will be a volunteer activity post-MBA; students should not be in the habit of getting credit for it</td>
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<td>• program would have to have enough students to support a class</td>
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### Full Course Credit

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<tr>
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<tbody>
<tr>
<td>• creates an accountability and oversight mechanism for projects</td>
<td>• Board Fellows program is designed to promote volunteer service; earning credit undermines this objective</td>
</tr>
<tr>
<td>• faculty advisor can be a key resource for the student in completing the project and managing its scope</td>
<td>• may overstretch faculty, depending on the number of students completing projects and pursuing credit for them</td>
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</table>
**NO COURSE CREDIT**

*Description:* The Board Fellows program is designed as a service opportunity. All efforts associated with it are purely extracurricular and not for course credit. Wharton's program is an example of a no-credit option.

<table>
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<tr>
<th>PROS</th>
<th>CONS</th>
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<tbody>
<tr>
<td>• Board Fellows program promotes volunteer service</td>
<td>• less committed students may not be weeded out</td>
</tr>
<tr>
<td>• students have responsibility for managing their own Board Fellows experience (e.g., reaching out for help when needed, managing project to completion)</td>
<td>• projects and board service may get off course without closer oversight</td>
</tr>
<tr>
<td>• faculty and program staff act as a supporting resource</td>
<td>• students may be less prepared for service</td>
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**Feedback and Monitoring**

*Decision: What feedback and monitoring systems will be in place?*

As a Board Fellows program develops and grows, creating feedback and monitoring systems increasingly is important. When the programs were smaller and newer, there were fewer communication and institutional memory issues. But as they have matured, it has become more challenging for program leaders to manage and monitor all the Board Fellows participants. Further, as the programs move out of their first few years, maintaining institutional memory becomes difficult. Creating feedback and monitoring systems is a critical part of maintaining and improving the quality of Board Fellows programs.

There is a tension that arises in monitoring Board Fellows between the desire for student autonomy and the importance of ensuring a quality experience for students and participating organizations. There is not yet a preferred model for balancing this tension, though almost all programs have some monitoring and feedback in place.

Components of this feedback and monitoring process include

- check-ins during the Board Fellow’s term
  - with students
  - with organizations
- gathering feedback at the end of the Board Fellow’s term
- process for maintaining institutional memory and records
- periodic detailed analysis

**Chapter III: Key Decisions about the Program Structure**
Check-ins during the Board Fellow’s Term

With students. After the initial match has been completed, most programs will check in with the students. The purpose of these check-ins by program leaders is to ensure that

- the student is receiving the necessary support from the organization,
- the project is progressing,
- the student is meeting the Board Fellows program requirements.

(For a sample from Wharton of the questions asked during a student check-in, see Appendix 4.) Each program needs to answer the following questions:

- How often will the leaders check in with students?
- How will the check-ins be completed—for example, in person or by e-mail?
- What will the leaders ask students when checking in?

With organizations. As with students, checking in with the organizations will help ensure a quality experience with the Board Fellows program. These interactions can also build the relationship between the Board Fellows program and the organization. The main purpose of these organization check-ins is to determine if the student is meeting the Board Fellows program requirements. Check-ins with the organization tend to be less frequent than the student check-ins if the match is going well. (For a sample from Wharton of the questions asked during an organization check-in, see Appendix 5.)

If a problem arises where the match between a Board Fellow and an organization is not successful, it is important to have a process in place to handle this situation. The following are several steps that can be taken:

If the student is not satisfied,

- the leaders of the Board Fellows program can intervene on behalf of the student; the most common issues for students are (1) not receiving the requisite support from the organization or (2) the organization misunderstanding the role of a Board Fellow (e.g., asking the student to complete administrative tasks, raise funds, or treating him or her like an intern),
- the program must decide if the issue is a mismatch of the organization and the student or the organization is not a good Board Fellows candidate.
If the organization is not satisfied,

- encourage the organization to contact Board Fellows program leaders as soon as there is a problem,
- discuss possible resolutions (was there miscommunication or a misunderstanding about the Board Fellows program?),
- offer to remove the Board Fellow if the organization feels the match is not successful.

Gathering Feedback at the End of the Board Fellow’s Term

Most programs collect feedback at the end of each service term using a written questionnaire or a debriefing interview. These are conducted individually with each Board Fellow and each organization. The results are then collected and discussed by the program leaders. Incorporating the findings from this feedback can be a valuable means of improving the program. (For an example feedback form, see Appendix 6.)

Process for Maintaining Institutional Memory and Records

The creation of an electronic database is the preferred form of maintaining institutional memory and records. While some space for paper records is necessary, electronic records reduce the need for space and are more easily transferred and shared with students. Since MBA programs generally have servers with space already dedicated for clubs, creating space for Board Fellows files should not be difficult to obtain.

Below is a list of information that is useful to save. If saved electronically, any information not relevant to the student population would need to be restricted.

- contact database for organizations
- for each year, a list of students who served as Board Fellows and the organization they served
- list of past projects, with a description and project deliverables (if applicable and acceptable to the organization, given any confidentiality considerations)
- record of student leaders and MBA staff members involved in overseeing the program, by year
- student and organization applications for Board Fellows program
- marketing documents for the program
- reference lists and training materials
- feedback forms from students and organizations
PERIODIC DETAILED ANALYSIS
Several Board Fellows programs have periodically completed detailed program analyses. The projects can be initiated by Board Fellows, student leaders, or the MBA-school staff members. They typically involve a student or team of students doing an internal analysis of the program and/or an external benchmarking study with other Board Fellows programs.

Some of the types of data these evaluations will collect include in-depth interviews and/or surveys of past student leaders, Board Fellows alumni, and participating organizations. These studies can uncover ways to improve the program and can be an invaluable part of the Board Fellows program development.

Tuck had a team of four students complete an internal analysis over the course of nine months. A consultant and alumna of the Stanford Board Fellows program spent a summer doing both an internal analysis and external benchmarking of that program.

RECOMMENDATIONS AND BEST PRACTICES
For check-ins.
• Complete the check-in face-to-face, if possible.
• By checking in early, leaders can address any issues before they turn into problems.
• Check-ins are even more critical if a project is involved.
• Use a list of questions when checking in to ensure items are not forgotten. (For examples, see Appendices 4 and 5.)
• Spell out these check-in requirements with students and organizations before they sign up for the Board Fellows program.

For feedback. Unlike check-ins, where face-to-face is preferred, written forms can be the best form of getting detailed, honest feedback at the end of a Board Fellow’s term. Sometimes, people are not willing to be as critical face-to-face. After reading the feedback forms, program leaders can always conduct follow-up interviews if warranted. Written forms are also easier to keep and pass on to subsequent program leaders.

For records. As discussed above, electronic records are the preferred method of maintaining records. Discuss options with the MBA-school’s technology department to determine if there is memory space available and what protections and restrictions can be used to protect private information.
For periodic analysis: In a program’s first few years, some form of detailed analysis needs to be done each year. After that, every two to four years is probably sufficient. Also, sharing the results of these studies with other Board Fellows programs can help everyone improve.

Communication Strategy

*Decision: What will be the program’s communication strategy?*

As with any business endeavor, Board Fellows programs need to have a communication strategy. There are two components to this strategy for the Board Fellows program: first, the program must develop the necessary documents, including a program description and marketing materials, applications, and feedback forms; second, the program must decide how it will disseminate this information.

Components include
* develop the necessary documentation
  * program description and marketing materials
  * applications for students and organizations
  * feedback forms
* disseminate the information
  * information sessions for students and organizations
  * use of the Internet

**Develop the Necessary Documentation**

Every program will need to develop a series of documents for marketing itself and providing its requisite services. Since the programs vary, the items discussed below are not necessarily a comprehensive list but are typical for most programs.

*Program description and marketing materials.* Each program will need to develop a program description that can be accessible to organizations, students, and others interested in learning more. This is a key component of the program’s marketing materials. (For example program descriptions and marketing materials, see Appendix 7.)

Marketing materials vary by Board Fellows program. Some programs develop separate materials for students and organizations, while others maintain just one document. One option for marketing to not-for-profit organizations is to create a single document that details all of the services the MBA school can provide to the local not-for-profits, including the Board Fellows program. This integrated approach could help direct not-for-profits to the services most useful to them while streamlining the relationship management for the MBA school.
Applications for students and organizations. For guidance on developing student and organization applications, see page 26, “Selection of Students,” and page 27, “Selection of Organizations.”

Feedback forms. For guidance on developing feedback forms, see page 35, “Feedback and Monitoring.”

DISSEMINATE THE INFORMATION

Information sessions for students and organizations. Once the documentation is developed, most programs will use a combination of e-mail messages to the student body and meetings with organizations to inform the community of the Board Fellows program.

Information sessions are held to educate students about the program and direct them to further information and the application. For organizations, this is generally done on a one-on-one basis by the individual who has responsibility for managing the organization relationship.

Use of the Internet. Most Board Fellows programs have a Web site describing their program. Beyond that, there is a great deal of variability in terms of how much information is posted publicly and how much of the program’s operations are completed using the Web. For instance, some programs allow organizations and students to download applications to the program and submit them online. (For an example Board Fellows Web page, see Appendix 8.)

Most programs maintain paper copies of their marketing materials to hand out, but the current trend is to move as much information and documentation to the Web as possible. This seems to please both organizations and students by making information more accessible. Posting online can also lighten the administrative load on the Board Fellows program by enabling participants to rely on the Web for general information and program applications. Lastly, it can be a recruiting tool for admissions, as prospective MBA students are increasingly scrutinizing the club offerings of each MBA program.

Since MBA schools have public Web sites, typically, there are technology personnel who can be contacted about Web site administration. Always be aware of any confidentiality considerations before posting names or information about not-for-profits online.
Once a Board Fellows program structure is determined, the next step is deciding on an implementation plan. While designing the program might seem like the most important step, implementation is equally critical. A well-designed program can fail if its launch is not carefully thought out. This chapter uses a series of questions to move through a feasibility and implementation analysis.

It’s important for planners of a fledgling program to examine their motivations, consider desired outcomes, and understand what components are in place (discussed below) that will make their program successful. It is not a good idea to start a program without sufficient motivation or support. The following sections take readers through a short discussion of “why” before launching into “how.”

Are the MBA students supportive of the program?

**Starting the Program**

To date, most Board Fellows programs have been started by students. Since students ultimately are the ones serving the organizations, it seems logical that the programs would come from them. But, as described in Chapter III, page 18, “Program Leadership,” most of those programs moved to a hybrid leadership model after the first several years of operation as continuity issues arose.

Some programs are now starting as a joint effort between the MBA-school staff members and the students, essentially hybrid from the beginning. Board Fellows programs can also start as a staff initiative. What is important about a program’s start is not who had the initial idea but rather the involvement of both staff members and students. That can mean that either the students or the staff members take a supportive role, while the other assumes the lead. The objective is for the program to leverage the resources and obtain buy-in from both groups.

**Gauging Support**

There is not a set number of Board Fellows in a program, though many schools seem to start with a minimum of 5–15 students in their first year. In gauging support for the program at an MBA school, there needs to be enough interested Board Fellows to staff most of the Board Fellows slots at the organizations. Some programs try to have at least two applicants for every position to ensure the program’s selectivity. There also needs to be support for the program beyond just one MBA class to ensure the program survives subsequent years.
TAKEAWAYS
Building enough interest among students has not been an issue among the current programs. Students seem to be very interested and excited about the program. In fact, the more common issue is that too many students apply for too few spots. The key is reaching out to the student community and educating them about the program. History suggests that once students are aware of the program, they will be interested.

Does the MBA school have the resources to support the program?
STARTING THE PROGRAM
As described above, support from the MBA school is critical in starting a Board Fellows program. Many MBA schools now have centers for social entrepreneurship, corporate social responsibility, or something similar. By becoming a part of one of these institutional agencies, the program can receive support, contacts, and guidance from the staff. The centers can also help the Board Fellows program formally organize as part of the MBA school.

These centers have become a key part of the hybrid model described earlier, increasingly partnering with students to start Board Fellows programs, offering administrative support, and managing the relationships with organizations. Since center staff generally support multiple service-oriented clubs, they are able to share information across clubs and build deeper relationships with the organizations. Some programs have had faculty pursuing research or teaching in the area, so connecting with these faculty could benefit not only the students as Board Fellows but the overall program as well.

BUDGETING
There are two key components to consider in the budgeting process: time and money. The amount of each required will vary by individual program, especially by leadership structure. For instance, those programs that are completely led by students will require only time, but the commitment will be substantial. By contrast, those programs that are led by MBA-school staff members will require funds, typically the cost of one full-time employee or a percentage of this cost. Hybrid programs typically fall somewhere in between. Program size and program offerings—namely, whether students are required to complete a project (which requires additional staff time to help scope and monitor)—also change resource needs.
STAFFING
If it is not an entirely student-run program, several key questions need to be addressed: How much staff support is needed? How much of the staff’s time would be allocated to the program? What type of background should the staff have, and what are some tasks they will be expected to do?

Are the local organizations interested in having Board Fellows?

STARTING THE PROGRAM
If local organizations are not interested in the program, there is no program. The organizations should be approached early in the program-planning process to solicit their input and obtain their support. Their input is critical in determining the structure of the Board Fellows program because the program must fit their needs.

Most MBA schools have existing relationships with some not-for-profit organizations. These organizations are often the most willing to join the program and offer input. Typically, they are also the most reliable since they have probably been involved in other MBA service programs. Another resource for recruiting organizations is alumni, especially if they are already members of the organizations’ boards.

GAUGING SUPPORT
There is not a required number of organizations that the program needs to operate. As a rule, if a program intends to place 5–15 Board Fellows in the first year, it will need roughly 3–8 organizations, depending on whether one or two Board Fellows are staffed at each.

TAKEAWAYS
The biggest challenge with organization recruitment seems to be communicating effectively what a Board Fellow can contribute and what tasks are appropriate during his or her service. Again, starting with organizations that have worked with MBA students before tends to alleviate this issue. These organizations then can be enlisted to help recruit other local organizations. Word of mouth is a powerful recruitment tool.

MBA schools are starting to integrate their organization recruitment among all their service offerings. Generally, once an organization has a positive experience working with MBA students, it is interested in using other services. As such, organization recruitment for the Board Fellows program can also come from the other MBA service organizations.
Web Sites

www.fuqua.duke.edu/centers/case/mba/fuquaonboard/index.html
www.socialenterpriseclub.com/boardfellows/index.html
www.kellogg.northwestern.edu/student/club/social/boardfellows.htm
www.gsb.stanford.edu/pmp/clubs/boardfellows.html
www.tuck.dartmouth.edu/initiative
http://nonprofit.umich.edu/students/board_fellowship.php
http://www.wharton.upenn.edu/mba/leadership/
http://mba.yale.edu

Interviews

FUQUA SCHOOL OF BUSINESS, DUKE UNIVERSITY
Matthew Nash, Associate Director,
Center for the Advancement of Social Enterprise

HARVARD BUSINESS SCHOOL, HARVARD UNIVERSITY
Margot Dushin, Director of Programs, Social Enterprise Initiative
John McCarthy, Harvard Business School Class of 2008

STANFORD GRADUATE SCHOOL OF BUSINESS, STANFORD UNIVERSITY
Bryna Chang, Interim Executive Director,
Public Management Program
Liz S. Peintner, Assistant Director, Public Management Program

TUCK SCHOOL OF BUSINESS, DARTMOUTH COLLEGE
Patricia Palmiotto, Director,
Allwin Initiative for Corporate Citizenship

WHARTON SCHOOL, UNIVERSITY OF PENNSYLVANIA
Professor Nien-hê Hsieh,
Legal Studies and Business Ethics Department
Sadaf Kazmi, MBA/JD Candidate 2008

YALE SCHOOL OF MANAGEMENT, YALE UNIVERSITY
Juliana Koo, Executive Director, Program on Social Enterprise
Research Presentations


Business Skills for Nonprofit Sector: Resources

MISSION


Social Impact/Performance Measurement


Marketing


Strategy


Cross-Sector Collaboration


References
Operations

Human Resources


Finance
General

The Nonprofit Finance Fund, www.nonprofitfinancefund.org, offers a series of articles, research, and tools that provide insight into building well-capitalized, financially viable nonprofit organizations that are better positioned to carry out mission and program.

Earned Income


Venture Philanthropy

Venture Philanthropy Partners and Community Wealth Ventures have produced a series of reports surveying the field of venture philanthropy and high-engagement grant making. The reports are available for download at www.vppartners.org.

Accounting


Capacity Building

General


General Resources for Nonprofit Board Members
(from Fuqua handouts to Board Fellows)
FINDING A BOARD OF DIRECTORS OR VOLUNTEER OPPORTUNITY
BoardnetUSA, www.boardnetusa.org, online service that matches nonprofits with potential board members.
**Bridgestar.** www.bridgestar.org, an affiliate the Bridgespan Group. Bridgestar is focused on serving as a bridge to attract talented people into the nonprofit sector at the board and senior-management levels.

**Network for Good.** www.networkforgood.org, a resource for donors and potential volunteers.

**VolunteerMatch.** www.volunteermatch.org, a place to find volunteer opportunities. Some companies have an in-house version of this service for their employees.

**CHECKING OUT NONPROFITS ON THE FINANCIAL SIDE**

**CharityNavigator.** www.charitynavigator.org, works to advance a more efficient and responsive philanthropic marketplace by evaluating the financial health of America’s largest nonprofits.

**Guidestar.** www.guidestar.org, contains extensive operational and financial information about more than 850,000 nonprofit organizations.

**Wise Giving Alliance.** (from the Better Business Bureau) www.give.org, collects and distributes information on hundreds of nonprofit organizations that solicit nationally or have national or international program services.

**GENERAL SOCIAL ENTREPRENEURSHIP SOURCES**

**CASE (Center for the Advancement of Social Entrepreneurship).** www.caseatduke.org, a research and education center based at Duke University’s Fuqua School of Business, CASE promotes the entrepreneurial pursuit of social impact through the thoughtful adaptation of business expertise; the CASE Web site includes resources on social entrepreneurship and scaling social impact, as well as numerous links to other helpful Web sites.

**Changemakers.** www.changemakers.net, an initiative of Ashoka that provides inspiration, resources, and opportunities for those interested in social entrepreneurship and social change throughout the world.

**Social Edge.** www.socialedge.org, an initiative of the Skoll Foundation that promotes online networking, dialogue, and learning among social entrepreneurs.
Social Enterprise Alliance. www.se-alliance.org, the membership organization leading the creation of a social enterprise movement. The SEA mobilizes communities of nonprofit organizations and funders to advance earned-income strategies.

**NONPROFIT MANAGEMENT AND GOVERNANCE**

*Action Without Borders.** www.idealist.org, provides links to informational resources, communities of interest, and employment and volunteer opportunities in the social sector.

*Board Café.* www.boardcafe.org, offers a menu of ideas, information, opinion, news, and resources to help nonprofit board members give and get the most out of board service.

*BoardSource.* www.boardsource.org, the premier resource for practical information, tools and best practices, training, and leadership development for board members of nonprofit organizations worldwide.

*Charity Channel.* www.charitychannel.com, best known for its nonprofit-arena discussion forums on such topics as grants and foundations, nonprofit law, fund-raising, and more.

*CharityNavigator.* www.charitynavigator.org, works to advance a more efficient and responsive philanthropic marketplace by evaluating the financial health of America’s largest nonprofits.

*CompassPoint.* www.compasspoint.org, nonprofit training, consulting, and research organization with offices in San Francisco and Silicon Valley; Web site contains numerous resources and useful links.

*Free Management Library.* www.managementhelp.org, a complete library of online resources for nonprofit and for-profit businesses, with 675 highly integrated topics.

*Interactive Knowledge for Nonprofits Worldwide.* www.iknow.org, a collection of sites that together make up an impressive map of the world of information and resources for nonprofits.

*The Internet Nonprofit Center.* www.nonprofits.org, includes “The Nonprofit FAQ” and a wide variety of resources of interest to nonprofit managers, staff, and volunteers.

*Nonprofit Genie.* www.genie.org, a collection of FAQs on topics such as board development, consultants, entrepreneurship, fund-raising insurance, strategic planning, and volunteer management.

References
Appendix 1a. Student Board Fellows Application: Tuck

Tuck Board Fellows Program
Information for Student Applicants

Introduction
The Tuck School of Business and area nonprofit organizations are partnering to place Tuck MBA students on local boards. This program, now in its fourth year, enables you to become involved in the local community, apply your business skills, and learn directly about organizational governance. The nonprofits benefit from the addition of new members with business acumen. Our overall goals are to strengthen local nonprofits and encourage you to continue your involvement with nonprofits in the future.

Program description and support
MBAs will use their business knowledge and participate as non-voting board members. Most agencies will accept 2 Tuck students on their board. Each participating nonprofit defines the responsibility of student board members. The responsibilities may differ among the participating nonprofits. Tuck Board Fellows are required to attend regularly scheduled meetings. You may be assigned to board committees and be asked to complete a special project. Organizations will appoint a board member who acts as your mentor. The Allwin Initiative will host a training session for MBA Board fellows, board mentors, and executive directors in the spring term with follow-up each term provided by the Allwin Initiative.

The Allwin Initiative facilitates the program by sourcing MBA applicants; developing an education session for the Tuck Board Fellows, executive directors and board mentors; working with both students and executive directors to monitor the success of the program; and acting as a resource for issues that may arise.

Application Process
Submit your cover letter and resume through the Allwin Initiative for a board position with a specific nonprofit. We forward the applications to the executive directors. The nonprofits select their two Tuck Board Fellows. We will provide you with a description of each organization and their expectations of board membership, so you understand the work of each organization and commitment before applying.

Program Timeline
Winter 2007 (Application Phase)
February 1 Program Introduction session for Tuck students
February 15 Student applications due to Allwin Initiative office
February 20 Student applications forwarded to executive directors
March 16 Nonprofits make final choices and notify Allwin Initiative
March 26 Allwin Initiative informs students about agency decisions

April-May 2007 (Orientation Phase)
MBAs attend educational session at Tuck (date TBD)
MBA Board Fellows learn about organizations and attend at least one board meeting

Summer 2007
Board Fellows keep in touch with and continue learning about organization.
(No other work is expected of students while they are on their summer internships.)

Fall 2007-June 2008 (Active Phase)
MBAs serve as active board members in a non-voting capacity and then help in securing new members from Class of 2009.

Spring 2008 (Evaluation Phase)
Program evaluation by student board members, executive directors and board chairs completed and submitted to Allwin Initiative.
Appendix 1b. Student Board Fellows Application: Fuqua

Thank you for your interest in the Fuqua on Board program. Before completing this form, please review the program description available at http://www.fuquaonboard.org.

A list of participating organizations is available at [LINK HERE]. That list will be updated as we receive additional applications from local nonprofits.

After completing this form, please send your RESUME to CASE at case@fuqua.duke.edu. We will contact you to arrange an interview to learn more about your interests and preferences.

1. First Name:

2. Last Name:

3. Class or Affiliation:
   - First Year
   - Second Year
   - Alumna/Alumnus
   - Fuqua Staff or Faculty
   - Other (please specify)

4. E-mail address:

5. Telephone:

6. Is there another student with whom you wish to be paired?
   - NO
   - YES (please name)
7. Please briefly describe your past volunteer or paid experience with nonprofit organizations, if any, including previous experience on nonprofit boards.

8. Why do you want to participate in the Fuqua on Board program?

9. What do you hope to learn during the program?

10. What is your perspective on the state of management and governance of nonprofit organizations?

11. Please rate your level of interest in the following fields / mission areas:

|-------------------|-----------------------------|--------------------------------|----------------|----------------------|-----|--------|-----------------------|--------|----------------|----------------|---------------------------|-----------------------------|----------------|---------------------------|

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**Appendix IB**
12. What other fields or mission areas interest you, if any?

13. Please rate your level of interest in the following types of committees or project team assignments.

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<td>Fundraising Strategy</td>
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<td>Organization Development</td>
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14. What other types of committees or project team assignments would interest you, if any?
15. Please indicate your preliminary preferences among the nonprofits participating this year. (NOTE: This ranking is not binding on your final decision. You can ask questions about these organizations during your interview and revise your preferences accordingly.)

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<th>1st Choice</th>
<th>2nd Choice</th>
<th>3rd Choice</th>
<th>4th Choice (if any)</th>
<th>5th Choice (if any)</th>
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<td>Achievement Academy of Durham</td>
<td>Big Brothers Big Sisters of the Triangle</td>
<td>Calvary Ministries of the Westend Community, Inc.</td>
<td>Carter Community Charter School, Inc.</td>
<td>Clean Energy Durham</td>
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<td>Durham Central Park</td>
<td>Durham Community Land Trustees</td>
<td>Durham Literacy Center</td>
<td>First in Families, NC</td>
<td>The Forest at Duke</td>
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<td>Girls on the Run of the Triangle</td>
<td>Habitat for Humanity of Durham</td>
<td>InStepp, Inc.</td>
<td>Keep Durham Beautiful</td>
<td>Meals on Wheels of Durham</td>
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<tr>
<td>Operation Breakthrough, Inc.</td>
<td>The Scrap Exchange</td>
<td>Threshold</td>
<td>Other (please specify):</td>
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16. For each of the following pairs, please indicate which end of the spectrum you find most appealing.

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<th>Prefer A</th>
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<td>PRE-STRUCTURED EXPERIENCE (i.e., clearly defined roles, goals, expectations up front, etc.) versus UNSTRUCTURED (i.e., you must negotiate roles and goals with the organization)</td>
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<td>TASK ORIENTATION (i.e., focus on producing specific deliverables) versus PROCESS ORIENTATION (i.e., learning about nonprofit governance and making general contributions to board decision-making)</td>
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<td>STABLE BOARD AND ORGANIZATION versus TRANSITIONAL (i.e., recent changes in leadership, strategy, etc.)</td>
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17. Comments on your preferences and answers to questions above, if any.

18. Is there any other information that we should know to help us match you with an appropriate organization?
19. Program Expectations & Norms: For each of the following, please confirm that you understand these expectations by checking YES or NO as appropriate.

FOB is an extracurricular volunteer program; you will NOT receive academic credit

YES  NO

You should expect to volunteer 10-12 hours per month, including time at board and committee meetings and at FOB training workshops and other sessions.

Attendance at workshops and peer networking sessions is required; if you are unable to attend, you must notify CASE.

This year’s FOB program does NOT include a formal consulting project; instead, you will be expected to make meaningful contributions to a board committee, task force, or project team and provide a final report.

Brief progress reports will be required at the end of Terms 2 & 3.

In the event you have difficulty in your FOB placement, you should contact CASE for assistance.

Thank you for your thoughtful responses to this survey. Your application will not be considered complete until we receive your resume at case@flqua.duke.edu. We will contact you soon to schedule an interview.
Appendix 2a. Organization Board Fellows Application: Stanford GSB

STANFORD GRADUATE SCHOOL OF BUSINESS
BOARD FELLOWS PROGRAM

Program Overview

Founded by students in 1997, the Board Fellows Program matches Stanford MBA candidates with the boards of Bay Area nonprofit organizations for 1-to-2-year fellowships. The program benefits both parties: students gain rewarding experience as non-voting board members, learning the complexities of nonprofit management and oversight, while the nonprofit organizations benefit from the business skills of the Fellow through project or committee work and develop contacts with young business leaders and the Graduate School of Business. Each year approximately 75 nonprofit boards and 100 students participate in the program.

Selection Process

Given that the Fellows work closely with the executive director and board members in a high-impact role, the Board Fellows Program is highly selective. In past years, over 100 students have applied for the available boards. Although the program adds new boards every year, our priority is to ensure a quality experience for each Board Fellow and organization. Therefore, Board selection is conducted through the review of a written application by the Board Fellows program leadership. The applications are evaluated with respect to the ability of the organization to articulate the need for a Board Fellow and the value of the potential experience for both the organization and the Fellow. As a supplement to the application, the organization’s 990 filing will be reviewed as well.

The selection and matching process of the Fellows is equally stringent. Potential Fellows complete a written application and participate in interviews with program leadership. Fellows are evaluated on the basis of their skills, enthusiasm, commitment, professionalism, and initiative. Once selected to the program, they are matched through a mutual selection process based on their interests and the needs of the organization as outlined in their application.

Expectations

Hosting Board / Organization

- Select a member of the Board or the Executive Director to serve as the student’s primary contact and/or mentor (the “Sponsor”)
- Help Board Fellow(s) develop an understanding of the nonprofit’s goals and challenges
- Invite Board Fellow(s) to full and advisory board meetings and introduce to other Board members
- Work with Board Fellow(s) to identify a project that can be meaningfully completed between January and May 2007, that utilizes the student’s business skills, and that respects the student(s)’ heavy academic commitments
- Provide the data or other information needed for the Board Fellow to complete the project
• Raise any potential issues or questions to the Board Fellows contact immediately
• Organize for the Board Fellow(s) to present final project deliverable results to board or staff where applicable

**Fellow**
• Attend all board meetings that do not conflict with classes
• Work with the Executive Director and Board sponsor to identify an appropriate project by December 1, 2006
• Complete the project by May 2007
• Provide a copy of project deliverables to the organization and Board Fellows program leadership
• Be proactive in ensuring a positive experience with the organization
• Keep assigned contact from the Board Fellows Leadership Team updated on progress and potential issues
• Attend all Board Fellows-sponsored training events

**Time Commitment**
Boards and participating Fellows should expect a time commitment of 2-3 hours per week (including board and committee meetings). The program requires that a member of the organization’s board acts as a mentor to enhance the Fellow’s learning and facilitate integration with the organization.

**Program Coordination and Support**
Four second-year students, all experienced Fellows, oversee the program. They are committed to providing a worthwhile experience to both the host organization and the Fellow. Each Board and Fellow will be assigned to one of these leaders as their contact based on the sector of the organization (e.g., education, homelessness, and environment). This person will serve as the primary contact for providing feedback, requesting assistance, and addressing issues that arise. Students will also be supported throughout the Fellowship process with sector and project-specific training led by professors and other experts.

**Timeline**
The timeline for the program is as follows:

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<thead>
<tr>
<th>Event</th>
<th>Date</th>
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<tr>
<td>Written Applications Due from Nonprofit</td>
<td>Sept 1</td>
</tr>
<tr>
<td>Hosts Contacted Regarding Acceptance/Waitlist status</td>
<td>Sept 27</td>
</tr>
<tr>
<td>Hosts Receive Name of Fellow</td>
<td>TBD (Nov 1)</td>
</tr>
<tr>
<td>Reception to Meet New Fellows, other Nonprofits</td>
<td>TBD (Week of Nov 6)</td>
</tr>
<tr>
<td>9) Regular Board/Committee Meetings</td>
<td>Nov 2006 – May 2007</td>
</tr>
</tbody>
</table>

If your organization is interested in hosting a Board Fellow, please complete and return the application **by September 1, 2006** to boardfellows.leadership@gsb.stanford.edu. The Board Fellows leadership team will contact you upon reviewing your application.

Questions? Please contact Lindsay Louie at louie_lindsay@gsb.stanford.edu.
STANFORD GRADUATE SCHOOL OF BUSINESS
BOARD FELLOWS PROGRAM

BOARD APPLICATION

Please complete the shaded areas of the cover page. For the short answer questions, please answer only those that are applicable based on whether you are a new or returning applicant. Please return the completed application to boardfellows_leadership@gsb.stanford.edu by September 1, 2006.

Organization:

Contact Information

Name:

Title:

Email Address:

Telephone Number:

Fax Number:

Address:

Web Address:

Executive Director:

Size of Budget:

Number of Staff:

Stage of Organization: □ Mature □ Growth □ Start-up □ In Transition

Dates and location of Board Meetings (November 2006 – June 2007):
Our experience has shown that a Fellow is much more effective and has a much better experience if he/she has a sponsor on the Board, who will act as their primary board contact and mentor. Who would be the Board Fellow’s sponsor?

Name:
Title:
Email Address:
Telephone Number:
Fax Number:

In case that Board leadership changes, we suggest selecting a secondary Board sponsor. Who would be the Board Fellow’s secondary sponsor?

Name:
Title:
Email Address:
Telephone Number:
Fax Number:

Please provide a summary description of the Board Fellow opportunity at your organization. It will be provided to Fellows to inform them of the opportunity, and will also be used to inform the matching process with potential Fellows. Please include your mission, programing, size of organization, board make-up / size, typical meeting frequency / location / date / time, potential project(s), and website. (Please limit your response to 300 words or less.)
The following questions will help us evaluate the extent to which a Fellow could contribute to your organization and the potential value of the experience for both the organization and the Fellow. Therefore, we encourage you to think carefully about a Fellow's potential role. If your organization is selected to participate, the answers will also help us find the Fellow who best matches your organization’s needs.

**New Applicants**

1. What is your organization’s history and mission? What programs support your mission?

2. How large is your board of directors?

3. What are the primary responsibilities of your board members? Please include information about any committee structure, if applicable, including frequency of committee meetings.

**All Applicants**

1. Why are you applying for a Board Fellow?

2. What skills or experience are most important in a Fellow?

3. While we expect that the organization and the Fellow will work together to define an appropriate project, it would help us during the matching process to understand what specific project(s) or initiative(s) you are considering for the Fellow. Please provide specific detail for each potential project. Include information on each of the following:
   - Description and Goals
   - Board Fellow’s Role
   - Other Team Members
   - Specific Deliverables
   - Anticipated Time Requirement

4. Feedback from Boards and students suggests that matching both a first year and a second year student with an organization provides continuity for the nonprofit from year to year, helps new Fellows get up-to-speed quickly as they become familiar with the nonprofit, and facilitates the completion of a quality project. Would you be interested in hosting two Board Fellows?

5. Are there any special circumstances facing your organization or board (e.g., new executive director, significant changes in funding, merger, etc.)? Please describe.
Appendix 2b. Organization Board Fellows Application: Fuqua

Duke CASE
Fuqua on Board 2007-2008 - NONPROFIT Sign-up

Thank you for your interest in the Fuqua on Board program, managed by the Center for the Advancement of Social Entrepreneurship (CASE) at Duke’s Fuqua School of Business.

Nonprofit organizations must complete this application to be considered for the program. We greatly appreciate your time effort. Your thoughtful responses are critical to our ability to select students for the program and to match your organization effectively with the students who may be of greatest assistance to you.

More information about FOB can be found on the internet at http://www.fuquaonboard.org. Information about CASE, including a calendar of upcoming speakers and events, can be found at http://www.caseatduke.org.

Please note that if you submit this application after August 10th, we may not be able to consider your organization for this year’s program, depending on the number of applications received by that date.

If you have any questions about FOB, please contact CASE Associate Director Matt Nash at mnash@duke.edu or (919) 660-7791.

NOTE -- If you do not have reliable internet access, or if you prefer not to submit your responses online, you may answer all questions in a separate Word document and send an electronic version to mnash@duke.edu.

* 1. Organization Name:

* 2. Contact Person:
* 3. Position/Title of Contact Person:

* 4. Mailing Address:

* 5. Telephone(s):

6. Fax:

* 7. E-Mail:

8. Website (if any):

9. Number of staff members & approximate amount of annual revenues:

* 10. Eligibility: For each of the following criteria, please indicate YES or NO by checking as appropriate.

<table>
<thead>
<tr>
<th>YES</th>
<th>NO</th>
</tr>
</thead>
<tbody>
<tr>
<td>A. Your organization is a nonprofit</td>
<td></td>
</tr>
</tbody>
</table>
based in Durham, North Carolina

B. You have a reasonably stable board of directors that meets at least quarterly (NOTE: Monthly board or committee meetings are preferable in order to maximize opportunities for student participation and learning)

C. You are willing to invite two students to participate in a non-voting role in board and committee meetings on a regular basis

D. You are able to provide mentoring and supervision to students assigned to your board (including a staff liaison AND a board member "mentor")

* 11. Has your organization participated in Fuqua on Board in the past?

   YES - We participated last year [may also have participated in previous year(s)]
   YES - We have participated in the past, but NOT last year
   NO
   UNCERTAIN

12. What is the mission of your organization? [NOTE: You may skip this question if your organization participated last year and your answer remains the same as last year.]

13. Please provide a BRIEF summary of your organization's main activities/programs. [NOTE: You may skip this question if your organization participated last year and your answer remains the same.
14. What are the key challenges that your organization is currently facing? How can Duke MBA students assist your board in addressing these issues?

15. How often does your board of directors meet? Where and when do they meet?

16. Please tell us about your board of directors. (For example: Number of members? Does the board work well together? Is the board actively involved in strategic decision making? Do board committees function effectively? Are there any issues we should be aware of concerning the level of board development?) [NOTE: You may skip this question if your organization participated last year and your answer remains the same as last year.]

* 17. Do you have any board committees, task forces, or project teams
to which you would like to assign the students? (NOTE: As FOB is a volunteer activity and not for academic credit, the program does NOT include a formal consulting project; however, students are expected to contribute to a committee in a meaningful way and deliver a final report.)

NO
UNCERTAIN
YES (please specify)

18. Additional Information (optional): Is there anything else that we should know that could help us match student board associates with your organization?

19. Which board member will serve as the students’ “board mentor”? (Leave blank if not yet known)

* 20. Program Expectations & Norms: For each of the following, please confirm that you understand these expectations by checking YES or NO as appropriate.

A. FOB is an extracurricular volunteer program; students do NOT receive academic credit, nor are they paid

B. Students expect to volunteer
10-12 hours per month, including
time at board and committee
meetings and at FOB training
workshops and other sessions
C. Fuqua students pursue an
intense course of studies
consisting of 4 six-week terms,
September-April. During
examinations and vacation
periods, students may not be
available to participate in board
activities
D. The students are MBA students
with an average of 2-3 years work
experience beyond college
E. The FOB program does NOT
include a formal consulting project;
instead, students are expected to
make meaningful contributions to a
board committee, task force, or
project team and provide a final
report
F. CASE welcomes participating
nonprofits to join us for FOB
training events and at special
events and speakers throughout
the year

21. Do you have any questions, suggestions, or concerns? (optional)

* 22. Today's Date:
Thank you very much for taking the time to complete this application. We will be in touch with you within a few weeks.

NOTE -- Prior to clicking "Done" below and thereby submitting this application, you may wish to PRINT a copy for your records. You may do this by clicking on the printer icon on the top of your browser window, or by hitting the [CTRL] and [P] keys at the same time.

Done >>
### Appendix 3. Board Fellows Annual Calendar: Tuck

#### Board Fellows Program

<table>
<thead>
<tr>
<th>Month</th>
<th>Activity</th>
<th>Objective</th>
<th>Task</th>
</tr>
</thead>
<tbody>
<tr>
<td>Late Sept.</td>
<td>Board Fellows Lunch</td>
<td>Regular BF’s meeting</td>
<td>Reserve Room</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Send out email reminder / invitation</td>
</tr>
<tr>
<td>Late Oct. - Early Nov.</td>
<td>BF’s Check-in</td>
<td>Early check for issues; Find out what projects/activities BF’s will be doing</td>
<td>Set aside office hours (30 - 60 minute time slots)</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>One-on-one / One-on-three meetings</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Record Projects in BF’s Project List</td>
</tr>
<tr>
<td>Mid Nov.</td>
<td>Board Fellows Lunch</td>
<td>Regular BF’s meeting</td>
<td>Reserve Room</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Send out email reminder / invitation</td>
</tr>
<tr>
<td>Early-Mid Dec.</td>
<td>Org Check-in</td>
<td>Check in with EDs for issues</td>
<td>Phone calls to EDs of each organization</td>
</tr>
<tr>
<td>Late Jan.</td>
<td>Board Fellows Lunch</td>
<td>Regular BF’s meeting</td>
<td>Reserve Room</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Send out email reminder / invitation</td>
</tr>
<tr>
<td>Early Feb.</td>
<td>Information Session</td>
<td>Recruit Next Class of Board Fellows</td>
<td>Reserve room</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>recruit 2nd year BF’s to participate</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>update presentation</td>
</tr>
<tr>
<td>Mid-Feb.</td>
<td>Applications Due</td>
<td>Identify Candidates</td>
<td>Compile Applications</td>
</tr>
<tr>
<td>Late Feb. - Early Mar.</td>
<td>Review Applications</td>
<td>Choose Candidates</td>
<td>Short list organization candidates</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Distribute applications to orgs</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Choose BF’s</td>
</tr>
<tr>
<td>Late Feb. - Early Mar.</td>
<td>Board Fellows Lunch</td>
<td>Regular BF’s meeting</td>
<td>Reserve Room</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Send out email reminder / invitation</td>
</tr>
<tr>
<td>Mid Mar.</td>
<td>Notify New BF’s</td>
<td>Confirm New Board Fellows</td>
<td>Communicate positions to new BF’s</td>
</tr>
<tr>
<td>Late Mar. / Early Apr.</td>
<td>Orientation / Training</td>
<td>Introduce New BF’s and Orgs / Set Expectations</td>
<td>Update Presentation</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Distribute Minimum Requirements</td>
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<tr>
<td></td>
<td></td>
<td></td>
<td>Recruit 2nd year BF’s to explain experience</td>
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<tr>
<td></td>
<td></td>
<td></td>
<td>Reserve Room</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Distribute List of Past Projects</td>
</tr>
<tr>
<td>Periodically</td>
<td>Organizations</td>
<td>Collect feedback (positive &amp; negative)</td>
<td>Communicate minimum requirements</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Set expectations for the program</td>
</tr>
<tr>
<td>Late Apr.</td>
<td>Board Fellows Lunch</td>
<td>Regular BF’s meeting</td>
<td>Reserve Room</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Send out email reminder / invitation</td>
</tr>
<tr>
<td>Early/Mid May</td>
<td>Exit Surveys</td>
<td>Find out what was accomplished / identify new issues</td>
<td>Email 2nd year BF’s survey asking</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Key accomplishments / Recommendations</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Most thing about the program / Worst thing about the program</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Collect hard copies of project deliverables for the library</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Update Project List</td>
</tr>
</tbody>
</table>
Appendix 4. Questions for Student Check-in during Board Fellows Term: Wharton

NonProfit Board
Leadership Program
Student/Board Acclimation Checklist

September – Week 1
☐ Have you heard from your organization?
☐ Did you receive relevant organization information?
☐ Has the first board meeting been scheduled?
☐ Do you have any questions or concerns so far?

September – Week 4
☐ Have you attended the first board meeting?
☐ Do you have a mentor?
☐ If so, what is your mentor’s name?
☐ Have you been in touch with your mentor?
☐ Are you on a committee? If so which committee are you serving on?
☐ Do you have a clear role on the committee or board? If so, what is your role?
☐ If not, do you plan to follow up and do you know who the right person to follow up with is?
☐ Are you clear when board/committee meetings happen going forward?
☐ Do you have any feedback or questions so far; is there anything else we can do to move things along?
Appendix 5. Questions for Organization Check-in during Board Fellows Term: Wharton

Nonprofit Feedback Survey
Feedback from you and your organization is a valuable tool as we develop the Wharton Nonprofit Board Leadership Program. Please take a few minutes to fill out the survey below. Thank you!

Name of organization:
Contact name:
Name of student board member:

1. What were your initial expectations of the student’s involvement with your organization?

2. Have your expectations been met so far? If not, please let us know why not.

3. What can your visiting board member can do during the remainder of the academic year to better serve your organization and make this a more mutually beneficial experience?

4. What skills or experiences did the student bring that were most relevant to the board? What additional skills or experiences do you wish the student brought?

5. Is there anything more the Nonprofit Board Leadership Program administration can do to be of help to you, or your student member?
Appendix 6. Feedback Form for the End of Board Fellows Term: Wharton

Final Feedback Survey for Nonprofits 2006-2007

1. Name of Organization
2. Name of Wharton visiting board member
3. What were your initial expectations of the student’s involvement with your organization?
4. Were your expectations met? Why or why not?
5. Was the student actively involved on a committee?
6. What skills or experiences did the student bring that were most relevant to the board?
7. What additional skills or experiences would have been helpful?
8. On a scale of 1 to 5 (1 being completely dissatisfied, 5 being completely satisfied), please rate your satisfaction with the participation from the student on your board?
9. Do you have any suggestions for improving the program in the future?
Appendix 7a. Sample Program Descriptions and Marketing Materials: Fuqua

Center for the Advancement of Social Entrepreneurship

Fuqua on Board Program

Program Description

The Fuqua on Board program matches Fuqua MBA students with Durham area nonprofits to serve as non-voting board members during the course of the academic year. Over the course of a seven-month apprenticeship, pairs of students work closely with a board mentor, participate regularly in board meetings, and serve on a board committee, task force, or project team. Students serve as non-voting “board associates,” gaining valuable insight into the inner workings of nonprofit organizations while providing the nonprofits with fresh perspectives and critical business skills.

Students and boards should expect a time commitment of 10-12 hours per month. This is an extracurricular volunteer commitment; students do not receive academic credits. Throughout the Fuqua on Board program, students are provided support through workshop training, peer networking sessions, and ongoing coaching from CASE staff as needed. Nonprofit counterparts are invited to many workshops and special events.

Benefits to Participating Nonprofits

* Gain access to talented business leaders with fresh and innovative ideas
* Strengthen relationships with Duke’s Fuqua School of Business
* Help develop future community leaders

Benefits to the Students

* Gain an in-depth understanding of the role of business leaders on nonprofit boards
* Learn from experienced mentors
* Develop the skills for effective and thoughtful community leadership throughout their careers
* Provide real-world environments to further develop business and communication skills

Changes to the Program in 2006-2007:

* Consulting projects will no longer be part of the FOB program; instead, each student board associate will be asked to contribute substantively to a board committee, task force, or project team.
* Triangle-area Fuqua alumni are invited to participate as board associates.

The following pages provide an overview of the program. Additional information and a link to the online application form can be found at: [http://www.fuquaboard.org](http://www.fuquaboard.org)
How Can Nonprofits Get Involved?

Nonprofit Eligibility

To be considered for involvement in the Fuqua on Board program, an organization should:

- Be a nonprofit based in Durham, North Carolina.
- Have a reasonably stable board of directors that meets at least quarterly. Monthly board or committee meetings are preferable in order to maximize opportunities for student participation and learning.
- Be willing to invite two students to participate in a non-voting role in board and committee meetings on a regular basis.
- Be able to identify one or more board committees, task forces, or project teams on which the students can serve.
- Have the capacity to provide mentoring and supervision to students assigned to the board. This guidance is most effective when provided by both the executive director and a designated mentor from among existing board members.

The Application Process

The Fuqua on Board program is selective for both students and nonprofits. An application and interview process identifies the best matches for the program. Once student applicants are accepted, they are then matched with nonprofits based on sector preferences, skills, and nonprofit needs and requirements.

Nonprofits interested in participating during the 2006–2007 academic year should complete the Internet-based application form as soon as possible (click here or see link at www.fuquaonboard.org).

Depending on the number of applications received, organizations that apply after September 12th, 2006 may not be considered until the next academic year, unless we are able to fill these positions with interested local Fuqua alumni.

Timeline

Generally speaking, CASE identifies nonprofit organizations for participation during the summer between academic years. Organizations participating for the first time may be asked to meet with CASE staff so that we can better understand the mission and needs of your organization.

Students apply to the program in September and are placed with nonprofits by early October. Students serve with their organizations until the end of the Fuqua academic year in late April. In some cases, and upon request of both the student and the organization, a first year MBA student may be able to serve as a Board Associate for a second academic year.

For More Information

The Fuqua on Board program is managed by CASE Associate Director Matt Nash. For more information, please contact Matt at (919) 660-7791 or mnash@duke.edu.
Frequently Asked Questions

How many students will be assigned to each nonprofit organization?
Our experience has shown that it is best to assign two students to each organization. By working in pairs, student board associates can learn about the organization quickly and provide a diversity of skills and expertise to the board.

How much time do the student board associates commit to the nonprofit organization?
The general guideline used is that the board associates should commit 2-3 hours per week to their organizations, or about 10-12 hours per month. This includes time spent at board meetings, relevant committee meetings, and required FOB training workshops and peer networking sessions. Please note that Fuqua students study in an intense, six-week term system. During examinations and vacation periods, students may not be available to participate in board activities.

Do board associates get academic credit for their service?
No. Fuqua on board is an extracurricular service learning program. Fuqua has other for-credit practicum opportunities for students. Please contact CASF for more information.

Do Board Associates get paid a stipend for their work?
No. Board Associates volunteer their time and talent to these organizations free of charge.

How will board associates be matched with nonprofit organizations?
Both students and nonprofit organizations must go through an application process including a written application and an interview with CASE staff. CASE will then match pairs of students with nonprofit organizations based on their skills, interests, and backgrounds.

Will students work on a consulting project for the organization?
No. In the 2006-2007 academic year, consulting projects will no longer be part of the FOB program. Instead, each student board associate will be asked to contribute substantively to a board committee, task force, or project team. By the end the year, students will submit a formal report or presentation to include specific recommendations for action. If students wish to undertake a more formal consulting project, they may discuss this with the staff and board of the nonprofit.

What if the board associate and the organization are not a good match?
If the student or organization feels that the match is not working, they should contact CASE immediately. CASE staff will seek the best solution on a case-by-case basis.

What type of training and support do FOB participants receive?
All students will attend an initial training on the basics of board governance and responsibilities. Each participating nonprofit organization is required to provide their Fuqua student with an agency orientation as well. During the year, there will be 3-4 additional training workshops that will be mandatory for all student board associates. These sessions are open to participation from nonprofit representatives as well. In addition, students will be asked to attend regular peer networking sessions throughout the year.
Can Fuqua alumni participate in Fuqua on Board?

Yes. Beginning in 2006-2007, the Fuqua on Board program will be expanded to include Triangle area alumni, who will participate in a similar capacity as students. Whenever possible, we will make every attempt to pair an alum with a current student. For more information and to announce your interest, please contact Matt Nash at mnnash@duke.edu.

What nonprofit organizations have participated in Fuqua on Board in the past?

Recent participants in the Fuqua on Board program include:

- Children's Flight of Hope
- Communities in Schools
- Conservation Trust for NC
- Durham Companions
- Durham Crisis Response Center
- El Centro Hispano
- Good Works
- Habitat for Humanity
- Institute for Healing in Society and Medicine
- John Avery Boys and Girls Clubs of Durham
- Laboratories for Learning
- Mallarmé Chamber Players
- The Mariposa School
- Montessori Community School
- NC Rea
- Organization for Tropical Studies
- Public Allies
- SeeSaw Studio
- Threshold
- TROSA
- Urban Ministries of Durham
- Volunteer Center of Durham
Appendix 7b. Sample Program Descriptions and Marketing Materials: Stanford
What types of students participate in Board Fellows?
Board Fellows are all Stanford MBA students. They come from a wide variety of backgrounds and typically have 2-5 years of professional experience prior to beginning their MBA.

What steps should we take to create a successful relationship with the Fellow?
A member of the Board or the Executive Director should serve as the Fellow’s mentor and point of contact with the organization. The Fellow should be treated as if he or she were a full board member and invited to all events to which a board member would be invited. The most successful relationships integrate the Fellow into board committees and regular board operations.

What are some of the projects that Board Fellows undertake?
Projects are proposed by the board and executive director of participating organizations. Projects vary widely, but are designed to leverage the Fellow’s management skills and should expose the Fellow to the strategic and operational issues faced by nonprofits. Fellows should never be asked to solicit donations as part of their project. Successful projects include:
- Conducting a board effectiveness audit by interviewing board members
- Segmented the organization’s donor base and analyzing current fundraising efforts to increase donations
- Benchmarks the marketing activities of similar nonprofits around the country to understand best practices
- Developing a strategic planning process for the organization
- Developing a survey tool to understand customer satisfaction and needs
- Building a financial model to improve planning and cost tracking

How do we create a successful project?
The Fellow’s mentor should work closely with the Fellow to identify a project that is meaningful to the organization, utilizes the student’s skills and experience, and can be done on the student’s own time. The project should be clearly defined and discrete (e.g., can be completed by June 2007).

Do Board Fellows receive academic credit or a paid stipend for their work?
No. Board Fellows volunteer their time and skills to nonprofit organizations. Occasionally, Board Fellows who want to execute a more in-depth and comprehensive project with a larger scope take the initiative to work with their organization and a time a faculty sponsor to conduct independent study project for credit.

What type of training and support is provided to Fellows and participating nonprofit organizations?
The Board Fellows program sponsors several mandatory trainings throughout the year, including a kickoff reception for Fellows and nonprofit hosts, a session on the basics of nonprofit board governance, and peer networking sessions for Board Fellows working on similar projects. The program also provides recommended readings and resources for various project types and stories examples of past projects. In addition, the Board Fellow leaders and Public Management Program staff are always available for help and advice.

What are the advantages of having two Fellows assigned to my organization?
Feedback from boards and students suggests that matching both a first year and a second year student with an organization provides continuity for the nonprofit from year to year, helps new fellows get up-to-speed quickly, and facilitates the completion of a quality project.

What if the student is not a good match with my organization?
If you feel the match is not working, please contact the Board Fellows leadership immediately. The best solution will be determined on a case-by-case basis.

Who is in charge of the program and how should I contact with concerns?
All questions and concerns should be directed to the Board Fellows leadership (boardFellows.leadership@stanford.edu) or the program’s staff advisor, Assistant Director Jennifer Rayl in the Public Management Program office (650-723-8963 or jrayl@stanford.edu).
Appendix 8. Sample Board Fellows Web Page: University of Michigan

The Nonprofit and Public Management Center’s Board Fellowship Program places qualified graduate students in our three partner schools as Fellows on the governing boards of nonprofit organizations in Southeast Michigan. The program is designed to create a cadre of professionals ready to take on board leadership roles upon graduation. It provides graduate students in Business, Public Policy, and Social Work with firsthand insight into the workings and procedures of an actual board, as well as opportunities to contribute to the board’s success.

Students apply to participate in the program and are matched to organizations based on the mutual interest of both parties. Students participating in the program must have:

- A record of academic and professional excellence
- Knowledge and skills relevant to the particular agency
- Sensitivity and commitment to issues of community needs, financial concerns, and confidentiality
- A commitment to serving the nonprofit sector

Responsibilities of a Board Fellow

- Serve as a non-voting board member for one year from January to December
- Attend all board meetings and serve on one board committee
- Help with and attend special events
- Utilize analytic and management skills to conduct a consulting project that is designed to meet the needs of the organization
- Commitment of time approximately that of a full board member (typically 8-10 hours per month)
Benefits of Being a Board Fellow

- Meaningful opportunity to participate in the management of a nonprofit organization
- Professional knowledge and skill in board governance
- Skills for effective collaboration with community leaders
- Opportunity to integrate skills learned in the classroom with the fellowship experience

Responsibilities of the Organization

- Provide a member of the board who will serve as the fellow’s primary contact and mentor
- Provide a formal introduction to the organization’s work and expectations for board members
- Keep the board fellow informed about organizational developments
- Communicate consistently and provide feedback about the progress of the fellow’s project
- Conduct a final wrap-up meeting with the fellow

Benefits for the Organization

- Addition of new perspective and input in board decisions
- Access to students’ knowledge and skills in a project to benefit the organization
- Relationship with potential candidates for future board and staff positions
- Linkage to the University of Michigan community

Types of Projects

- Conduct cost/benefit analysis
- Develop marketing plan for new memberships or sponsorships
- Formulate strategic plan for new initiative
- Design process to assess customer satisfaction
- Create volunteer management training for new programs
- Evaluate funding opportunities and revenue sources
- Identify potential collaborators and competitors

Important Dates
• July - September: Organization Sign-up Period
• September - October: Student recruitment and application process
• November - December: Student acceptance notifications and matching to organizations
• January - December: Board Fellowship and Research Project

For a complete list of sites where Board Fellows have successfully completed fellowships, click here.

If you are affiliated with an organization that would like additional information about having a Fellow on your board, contact NPM at (734) 763-4214 or via email at nonprofit@umich.edu.

http://nonprofit.umich.edu/students/board_fellowship.php