

Shared Leadership: Board and CEO Partnership During COVID-19 Era



Linda Jacobs, CEO
Center for Volunteer &
Nonprofit Leadership



Dr. Jeff Boehm, CEO
The Marine Mammal Center



Luana Vaetoe, CEO
Becoming Independent

Recording & slides will be available after the presentation at cvnl.org

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Marin Community Foundation, and
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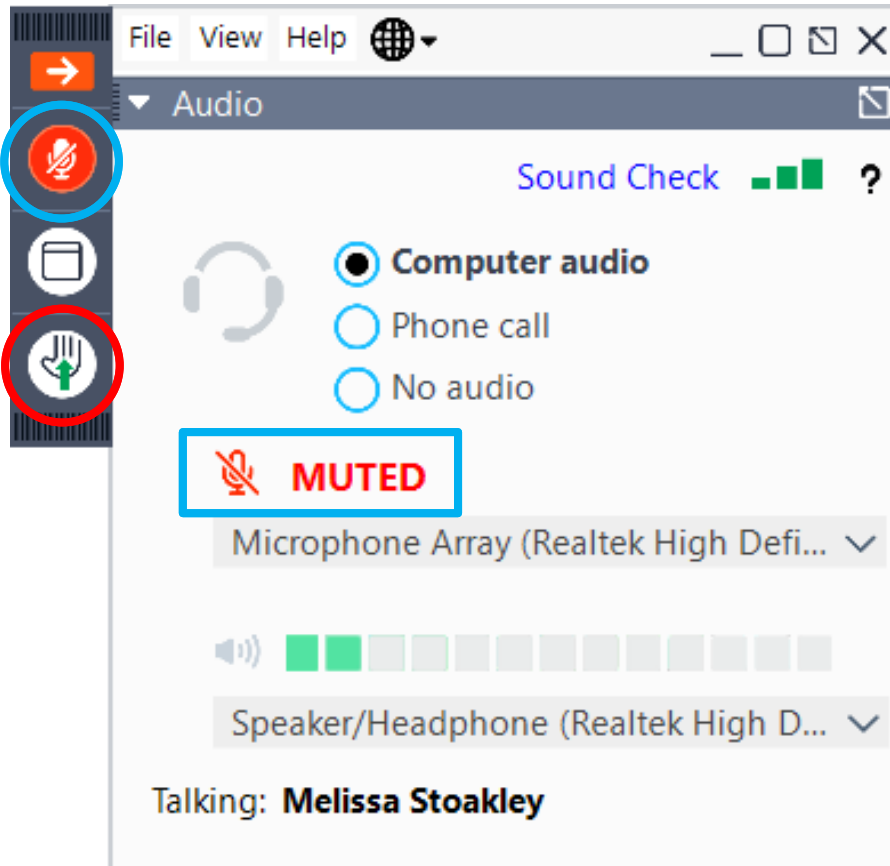


Partnership Resources Group

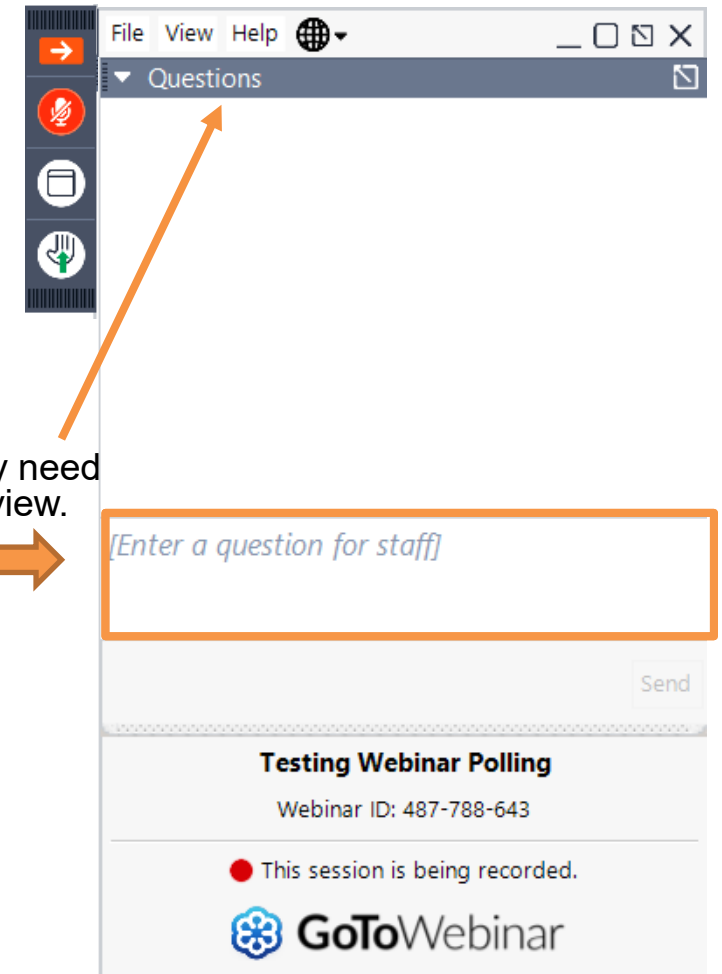
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Q&A Portion
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Shared Leadership: Board and CEO Partnership During COVID-19 Era



Linda Jacobs,
CVNL, Chief Executive Officer

With over 40 years of combined executive and nonprofit management experience, Linda frequently presents on issues and trends in the nonprofit sector and consults with nonprofit leaders on:

- Board Governance
- Succession Planning
- Leadership Development

Why is this Crisis Different?

- Every nonprofit, executive, board, human is impacted in some way.
- Many CEO's started their career after 2008 and may not know how to manage through a significant financial crisis with their board.
- Much is still unknown – When will it end?
How will we know? What rules will we have to open back up?
How do we plan for uncertainty?
- Can feel like every person/organization is on their own.
- Rapidly changing issues for the organization, staff and the people you serve.
- What is similar is that a crisis brings people together to focus on what needs to be done - Prioritize and Focus!



Poll:

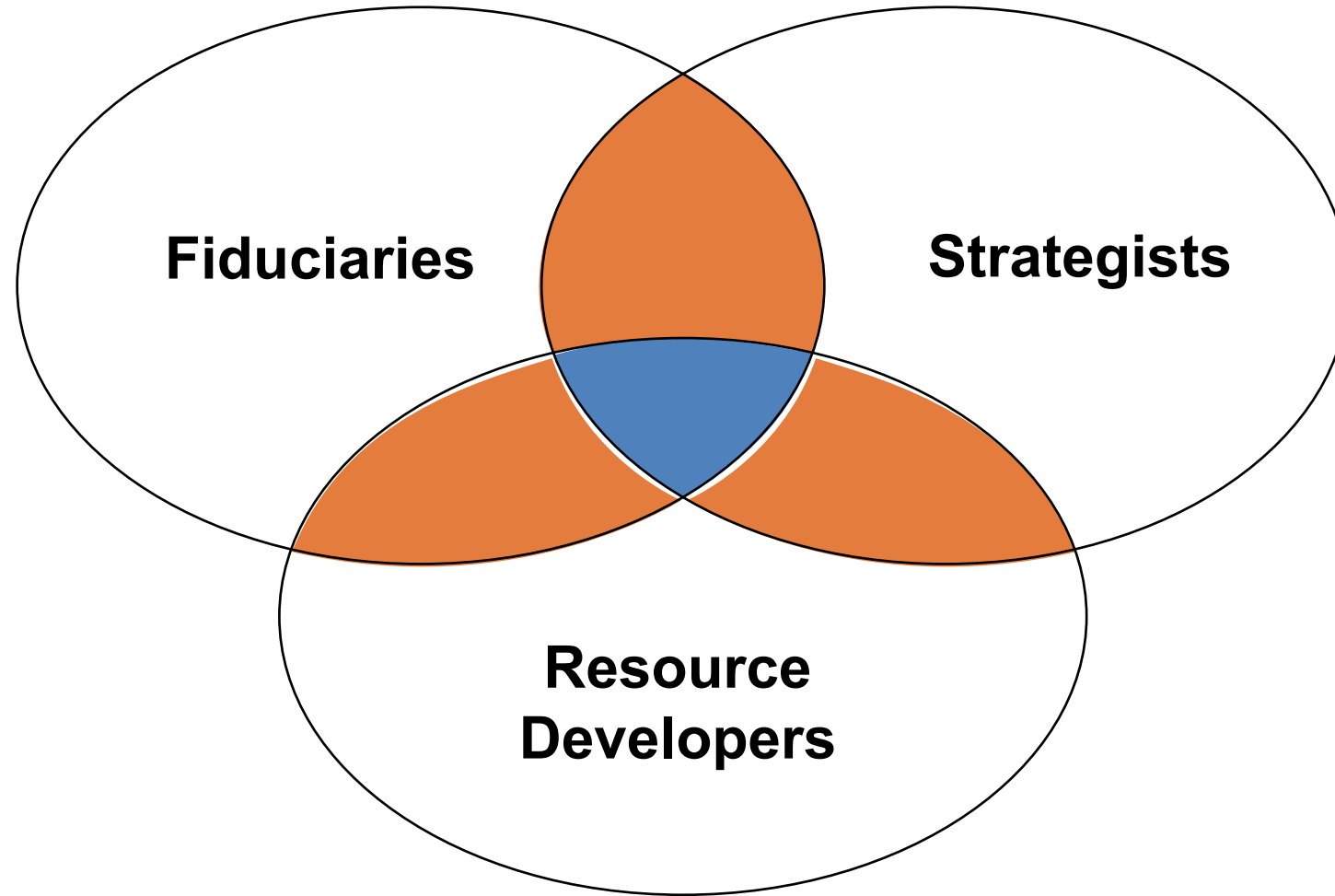
Are you doing things differently with your board?



Let's Address the Poll



Board Roles



Board Roles Now – Focus

- Strategic
 - Short term planning (people, programs, financial)
 - Long term planning
 - Partnerships, merger, closure
- Fiduciary
 - Develop and monitor a financial forecast – the budget is likely unrealistic
 - When developing your 2020-2021 budget consider assumptions - may need two versions
- Resource Development
 - Positive reputation more important than ever
 - Check in with funders, donors, board members
 - All board engaged and helping with fundraising



Poll:

Has your board stepped up with additional financial support?



Poll:

Have you used your board members to help make decisions?



Let's Address the Poll



Shared Leadership

- Stay connected.
- Keep agendas and minutes.
- Have a plan B and maybe a C – based on timing - events, how much funds can lose before letting staff go or stopping services, what orgs would make a match for a potential merger, how and when to use reserve funds.
- Timely and clear decisions.
- What committees do you need?
- What experience is missing from the board that you need now? – don't have to be a board member to participate.
- Bylaws – follow them if you can, not the time to rewrite, if impossible to follow consider a vote to suspend specific ones – for example, if annual meetings can't be held, virtual or electronic meetings are not included, you need to extend terms, changes are needed to required quorums.

Join me in Welcoming...



Jeff Boehm, CEO
The Marine Mammal Center

Jeff Boehm joined The Marine Mammal Center in 2008, but his commitment to the mission of the organization traces back to 1980 where he started as a volunteer at the Center. He now leads more than 100 staff, 17 board members, and 1,300+ volunteers in an organization that advances ocean conservation through marine mammal patient care, innovative science, and STEM-aligned education.



Luana Vaetoe, CEO
Becoming Independent

Luana Vaetoe has been with Becoming Independent (BI) since 2007 and was named Chief Executive Officer in 2013. Her team includes 240 staff that serve over 1,100 clients across Marin & Sonoma County. With the support of her 13 board members, Luana has spearheaded significant operational and program growth.

Panel Discussion:

- During the pandemic –
how are you and your board working together?



Poll:

How has your experience been working with your board? Positive, negative, or both?



Panel Discussion:

- What do you think is the most important thing a CEO can do during this time with regards to how they work with their board?

Panel Discussion:

- What are some of the board communications you've used over the past several weeks?



Panel Discussion:

- What's the biggest challenge you and your board are facing?



What Does a Shared Partnership with Your Board Look Like?

- No surprises.
- All members are accounted for, step up and act.
- Decision making is fast - what is needed in these uncertain times?
- Focus on what aspects of your mission are critical now? Is there a role you can/should play in this pandemic? Plan and decide based on changing demands.
- Address financial concerns and plan accordingly.
- Agree on messages - What do we tell our donors?
- Immediate needs as well as future are considered.
- Board shares their expertise and connections.
- Develop a business continuity plan.
- Discuss what it looks like to re-open.
- Support fundraising.
- Have conversations – some may be hard, such as, should we consider partnerships, merger, closing?



REMEMBER...No one can do it all and no one can do this alone!!

Q&A Session

At this time we would like to invite your additional questions.

Time permitting we hope to respond to everyone's inquiries



The image shows a GoToWebinar interface for a Q&A session. It features a sidebar with icons for navigation and a main panel with a 'Questions' section. A text input field is highlighted with an orange border, containing the placeholder text '[Enter a question for staff]'. Below the input field is a 'Send' button. At the bottom of the interface, there is a section titled 'Testing Webinar Polling' with the Webinar ID: 487-788-643. A red dot icon indicates 'This session is being recorded.' and the GoToWebinar logo is displayed at the bottom.

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Resource Pages

cvnl.org/covid-landing-page

partnershipresourcesgroup.com/covid-19_resources

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Thanks for joining us!



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