

Playing Board Games

Create. Accelerate. Succeed. Excel!



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Playing Board Games

- Daunting and difficult task to re-configure a board, or create a new one
- CASE STUDY: UC Davis Graduate School of Management
 - Board focus and direction that better match the School's strategic objectives, and
 - Far better, more meaningful engagement of key volunteers and alumni.



UC Davis GSM

The image features a map of California with three callout boxes highlighting specific UC Davis Graduate School of Management (GSM) programs. The callouts are:

- GALLAGHER HALL, HOME OF THE DAYTIME MBA PROGRAM**: Located in Davis, CA.
- HOME OF THE SACRAMENTO WORKING PROFESSIONAL MBA PROGRAM**: Located in Sacramento, CA.
- HOME OF THE SAN FRANCISCO BAY AREA WORKING PROFESSIONAL MBA PROGRAM**: Located in San Ramon, CA.

The map also includes labels for major cities and regions such as Davis, Sacramento, San Ramon, San Francisco, Oakland, Berkeley, and San Jose.

Increasing Global Visibility



The
Economist

No. 3 Worldwide in Faculty Quality

No. 5 Globally for Recruiter Diversity

Top 35 MBA Program in
North America



FINANCIAL
TIMES

Top 50 MBA Program in U.S.

No. 1 Worldwide for Percentage of
Female Faculty (42%)



Top 10% of AACSB-accredited
MBA programs in U.S. for
15 consecutive years



Top 5 in U.S. and No. 1 in Calif.
Greatest Opportunities for Women
(2009)



No. 29 Worldwide for
Social Responsibility



No. 16 in U.S. Part-Time
MBA
Return on Investment

GSM Advisory Boards

- Dean's Advisory Council
 - Started in 1997, non-alumni
 - Original purpose: provide credibility
 - Now: strategic renewal and growth; requires more diverse, strategic representation, fundraising
- GSM Alumni Association Board of Directors
 - Started in 1992
 - Original purpose: Vehicle for involvement and engagement of young alumni
 - Now: Nominating committee, diversity, focus on School priorities and objectives, fundraising

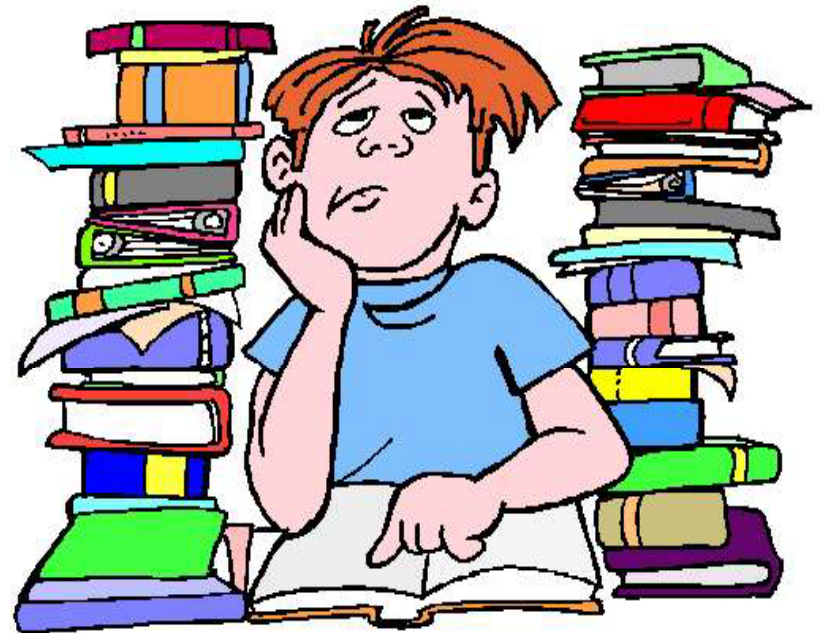
CREATE...

- A clear strategy and objective for your board members
- Develop specific criteria and measurable outcomes before you put your board together.
- Create a roadmap to help you transition that board from its current state, to one that is in line with your institution's objectives.



Homework: Getting Started

- Assess your goals: what do you need from a board?
- How well does your existing board meet your current organizational objectives?
- Is your board representative of your organization?
- Is your board effective?
 - If not, why not?



Benchmarking



- Sources
 - Other Schools/units on campus
 - Other B-schools (AACSB information, informational interviews with colleagues at other institutions)
 - Solicit input from your volunteers
 - GSMAA ran their own benchmarking study
 - Consider surveying your greater community
 - Input from DAC board members who serve on other non-profit boards

What are your key strategic goals?

- GSM examples of key goals
- How far along are you in each of your goals?
- Where do you need the most help?
- What kind of skills, connections, knowledge and experience will help you reach the “next level”?
- Prioritize and decide how board members can be most helpful.

Assessment and Definition

- Assess your current board
- Define gaps: what's missing?
- Build a roadmap
 - Draft Roles and Responsibilities/Position descriptions
 - Plan for roll-out
 - Build a target list
 - Recruitment strategy



Dean's Advisory Council Assessment Worksheet

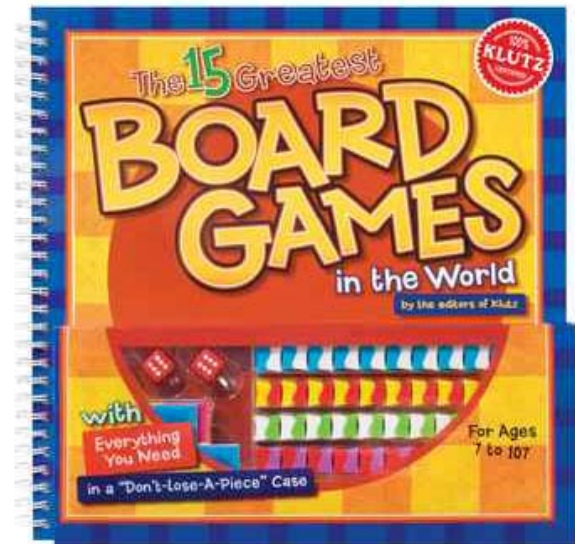
- Service
- Giving
- Gender
- Age
- Ethnicity
- Education
- Profession
- Expertise



- Constituency
- Location
- Additional Characteristics
 - Time available
 - Other board experience
 - Connections
 - Ability to give
 - Commitment to GSM
 - Leadership Potential
 - Action oriented

The GSMAA Board of Directors

- Two key findings from benchmarking study
 - Selection, not election
 - Focus on Fundraising
- Other Schools' much more focused on School Strategy
- Working off of goals: GSMAA board created a Scorecard



ACCELERATE...

- Your plan.
- Create clear roles and responsibilities with input from existing key volunteers.
- Listen, assess, benchmark. And then get moving!
- Create a communications plan and strategy that builds the board you need



Clear Organizational Strategy

- Create clear roles and responsibilities for the board
 - Be very clear up front to avoid misunderstanding
- Test and refine new goals with current members
 - Staff interviews with DAC
 - Board interviews with alumni
- “Professionalize” the board



Do you have the right people in place?



Ability to articulate your case

- Why should someone want to be involved with your board?
 - What's in it for them?
- Excite people and enthuse them about being involved with you
- Be clear about what kind of advice you need and where you are going
- Practice delivering your case to see if others find it compelling



Recruiting new board members

- Create a target list
- Ask your friends, colleagues, mentors, vendors, and donors if they know people who meet the profile you seek.
- Ask for personal introductions to your target advisers.
- Create a method to take nominations from other board members.
- Be very selective in who adding/where adding:
 - Having discussion, giving them roles and responsibilities to review, inviting as guest to a meeting
 - Consider a trial period
 - Opportunities to “ask stupid questions”
- Be sure they understand any financial commitments.

Consider...

- Creating limited terms of service: allows you to easily rotate people off as needed...
 - Some advisers will contribute more than others, and don't worry if an adviser doesn't end up working out.
 - Rarely is it worth "firing" one—you will still gain credibility via your association with them.
- The snowball effect: once you get one or two recognizable people, it will be easier to get the others.
 - Think carefully about the order you approach people in

SUCCEED...

- With clear objectives up front, and specific deliverables for your board to accomplish, you create much happier, more engaged volunteers.



Working it!

- Method of engagement: clear roles and responsibilities help manage expectations for all
- Incorporate into regular communication flow
- Keep requests within the scope of board member expertise; establish a success pattern from the get-go
- Monthly Alumni E-newsletter

Now your board...

- Has a much clearer understanding of goals
- Are tighter, more focused, more engaged
 - Staff morale also greatly improved when working with more functional boards
 - Work spent on productive things, achieving measurable goals
- Is proud and honored to serve
 - Able to attract top-level new members
 - Celebrate success and regularly revisit what your board has accomplished
 - Show them they are having an impact

How can they help you?

- Peer Screening, visits program
- Business Partners, Take-A-Seat
- Endorsement, co-sponsorship
- Signing annual fund and peer solicitation letters
- Identifying potential future board members
- Message testing

As you work together over the coming months and years, fulfilling relationships and terrific connections will result.



EXCEL!

- Strategic thinking, execution means everyone wins!
- Engaged, satisfied volunteers who help advocate more effectively for your School
- No more “bored” members
- Moving in the same direction to help your School excel.



The Dean's Advisory Council today

- More engaged: “best meetings I’ve ever been to...”
- Excitement of board members → more dynamic interaction, more rewarding for all
- Much clearer understanding of goals
- More effective for the School
 - Fundraising success; strategic connections; advice
 - Venue for engagement of major gift prospects
 - Ability to “graduate” members who should move on



The GSMAA Board of Directors

- Higher functioning alumni board
- Tighter, more focused board: excitement about mission
- Pride and honor: respect and credibility
 - GSMAA president now on DAC
- Able to attract top-level new members
- Measurable/obtainable goals
 - Celebrate successes, use Scorecard



Questions and Discussion

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Thank You!