

# What to know before serving on a board

Written on May 9, 2024

*By Jessica Salerno-Shumaker, OSCPA senior content manager*

Whether you're interested in joining a nonprofit or corporate board, there are some areas you should understand before making that commitment.

"I've been on a lot of boards where somebody raised their hand to be on the board, and then they just weren't all in," said Lori Kaiser, CPA, founder of Kaiser Consulting. "They would miss meetings, not do what they volunteered to do or not understand their committee assignment."

Kaiser has served on a wide variety of corporate and nonprofit board, including as a past president of OSCPA's board of directors, and said over the years she learned a great deal about how to make board service successful.

Before joining a board, whether it's corporate or nonprofit, you understand the responsibilities required of you, Kaiser said.

For nonprofit boards, make sure you support and feel invested in the mission. Kaiser said she encourages people to go to fundraisers or ask to join a committee to find out if it's a good fit.

"If you're engaged and passionate about the nonprofit mission then you'll gladly spend your free time doing that extra work or attending meetings," she said.

Ask what the organization looks for in board members, the skill sets they're interested in, how often they meet and when and the amount of prep necessary.

"When I want to go on a board, I make sure that I'm going to be able to execute everything they expect," Kaiser said. "And most boards have a responsibilities document that you can get and understand what's expected of board members."

Nonprofit boards also might have donation requirements, she said, and if you're giving money to an organization you want to know this ahead of time and that it's something you're comfortable with.

If you're looking for a for-profit board, Kaiser said don't be afraid to let people know you're interested. Before joining her first corporate board, she spent months having regular coffee meetings within her network letting people know until eventually someone passed her name along to an opportunity that made sense.

"When you've joined a board don't be afraid to ask questions, be curious, and, and contribute," she said. "Often if you're thinking of a question, other people are too, and you are in the room for a reason. Don't be afraid to step up and ask about certain issues. That's your duty as a board member."



*Lori Kaiser, Founder of Kaiser Consulting*