



THE NEW BOARD MEMBER

# Survival Kit

*A Practical Guide for*  
**Discernment, Readiness,**  
*and Effective Governance*

- Discern wisely *before saying yes*
- Identify dysfunction *warning signs*
- Establish *strong* first-year board habits

— DR. BILL ROWLEY —



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# The New Board Member Survival Kit

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**Welcome**

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# Welcome

You said yes.

Maybe you were inspired by the mission. Maybe a friend recruited you. Maybe someone caught you at a weak moment after a particularly moving fundraising dinner... right between the auction and dessert.

However it happened — welcome.

Serving on a nonprofit board is one of the most meaningful ways to contribute to a cause you care about.

Most people join a board before they know what they're walking into. It is a serious legal and fiduciary responsibility that most people don't fully appreciate until they're already sitting at the table... quietly wondering what a quorum is and hoping no one asks them to second a motion.

This kit exists to change that. This isn't about joining a board. It's about joining the *right* one.

Feeling a mix of excitement and uncertainty as a new board member is completely normal. Some organizations have a thoughtful onboarding process. Others have... enthusiasm and a binder.



## Welcome

Either way, the first few months (and sometimes the first year) are a learning curve. You are not alone. Almost every new board member has that moment of thinking:

*Am I asking the right questions?*

*Am I reading the right things?*

*Am I even in the right meeting?*

That feeling isn't a sign you made a mistake. It's a sign you're paying attention.

Whether you're considering your first board role, evaluating a new opportunity, or realizing after three meetings that no one handed you a roadmap, this guide is for you.

It won't overwhelm you with theory. It won't bury you in governance jargon. It will give you practical tools to:

- Ask better questions
- Spot early warning signs
- Show up to your first 90 days with clarity and confidence

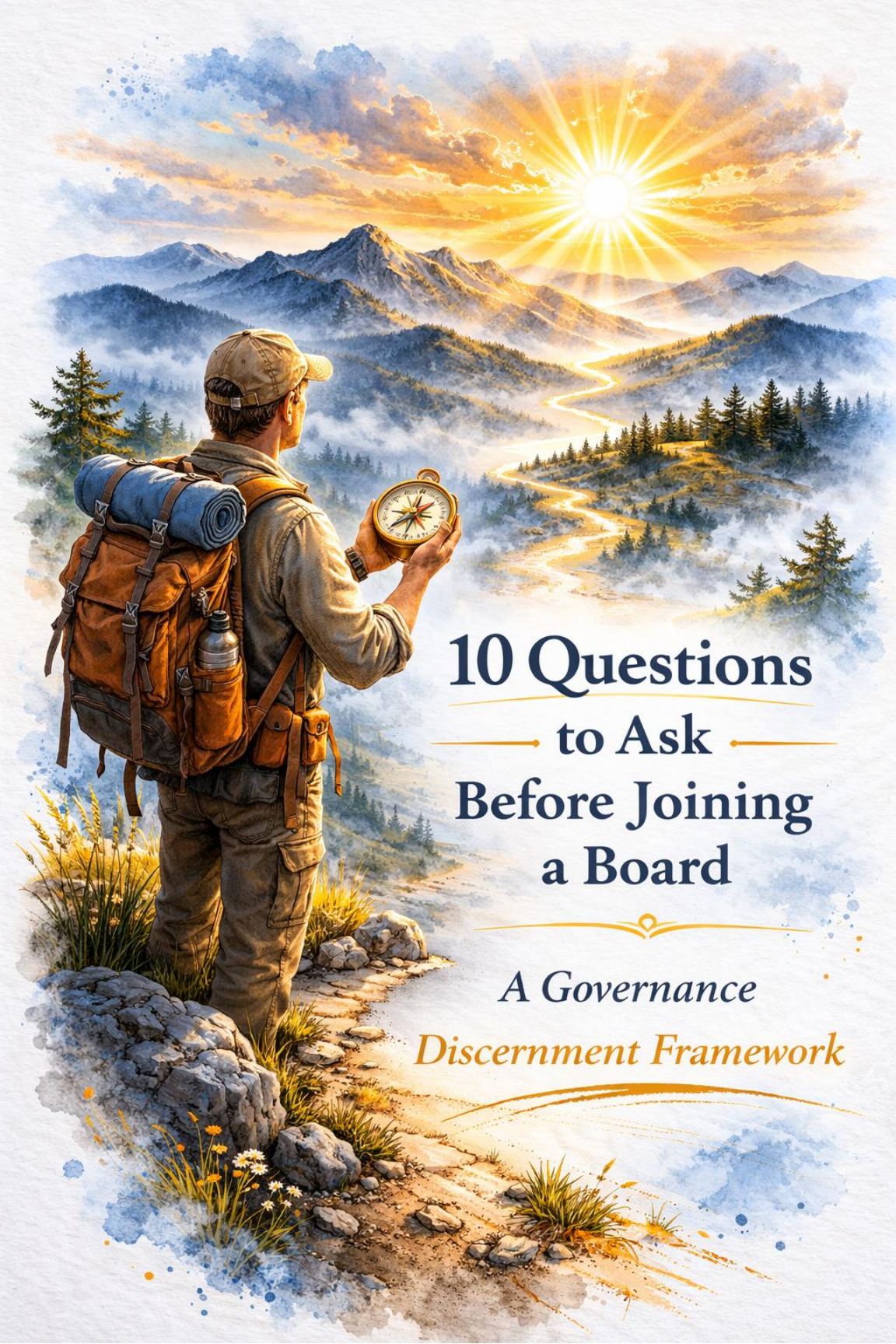
If you're reading this before saying yes, well done. You're already ahead of most people.

If you're reading this after — you're still in good shape. The best time to get oriented is before you join. The second-best time is right now.

If you only take one thing from this guide, ask better questions before you say yes.

Let's get started.





**10 Questions**  
— to Ask —  
**Before Joining  
a Board**

*A Governance  
Discernment Framework*

## 10 Questions to Ask Before Joining a Board

Most people join boards with too little clarity. These 10 questions change that.

Joining a nonprofit board is a meaningful way to contribute to a mission you care about.

It is also a significant legal and fiduciary responsibility; one most people accept before asking a single hard question.

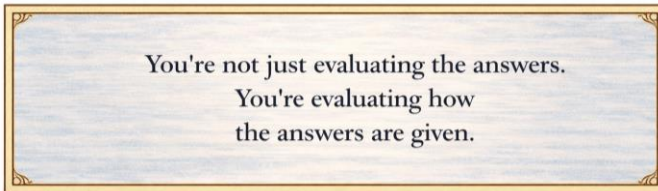
To be fair, no one hands you a list of hard questions when you're being recruited. They hand you a brochure. They tell you about the mission.

It's compelling.

There are often photos of children. Or animals. Sometimes both, which can be basically unstoppable.

Before you say yes, here are ten questions worth asking, and what the answers will quietly tell you.

As you ask these, notice: are the answers clear, or concerning?



These are the questions I use when advising board candidates.



## **ABOUT THE ORGANIZATION**

### **1. What is the mission, and is it clear and current?**

Do you understand the mission, not just the activities?

Does it actually guide decisions and strategy?

Can people across the organization articulate it without reading it off the website?

### **2. What are the expectations of board members?**

What is the term length? Meeting frequency? Committee involvement?

What are the expectations around fundraising, giving, and time outside of meetings?

Ambiguity here doesn't stay ambiguous. It turns into frustration.

### **3. What is the financial health of the organization?**

Ask to see recent financial statements, the current budget, and (if applicable) audit reports.

Are revenue sources diversified?

Are there reserves — or just optimism?

### **4. What are the organization's biggest current challenges, and how is the board responding?**

Financial strain, leadership transition, reputational concerns, rapid growth, or quiet decline.

Every organization has challenges.

The question is whether they're understood — and openly discussed.



## **ABOUT THE BOARD**

### **5. How does the board interact with the Executive Director (or equivalent senior leader)?**

Are governance and management roles clearly defined?

Is there a structured evaluation process for the ED?

When roles are unclear, boards either disengage... or micromanage. Sometimes both in the same meeting.

### **6. How strategic is the board?**

Does it focus on long-term direction — or spend most of its time in operational weeds?

Is there a current strategic plan... or a strong intention to create one in the future?

### **7. What is the board culture like?**

Are discussions thoughtful and respectful?

Is healthy disagreement welcomed?

Do members come prepared — or arrive hoping the agenda will explain itself?



## ABOUT YOU

### **8. Why is this board seat open?**

Routine term rotation is normal.

Multiple recent resignations deserve conversation.

The story behind an open seat often tells you more than the role description ever will.

### **9. How can I genuinely add value?**

Do your skills fill a real gap?

Does your network align with fundraising or community needs?

Board service is about contribution — not affiliation, not optics, and not adding another line to LinkedIn.

### **10. Does the organization provide governance training and onboarding?**

This matters more than most people realize.

The answer will tell you a great deal about how seriously the board takes its role.

*(If the answer is “we train on the job”... keep reading. We’re about to get into red flags.)*



## 10 Questions to Ask Before Joining a Nonprofit Board

### A Simple Way to Interpret What You Heard

After asking these questions, step back and notice the pattern:

- **Mostly clear, thoughtful, and consistent answers**  
→ You're likely looking at a healthy or improving organization
- **Mixed answers, some clarity, some concern**  
→ Proceed with caution — this may be a “Yes, but...” situation
- **Vague, defensive, or inconsistent answers**  
→ Pay attention. You may already have your answer

Remember, you are not just evaluating the answers. You're evaluating how the answers are given.

*Most people read this once.*

*The best candidates use the next page in real conversations.*



# Board Readiness Diagnostic

*Use this to quickly evaluate the clarity and quality of the answers you receive.*

| Question                             | Clear                    | Concern                  |
|--------------------------------------|--------------------------|--------------------------|
| Mission is clear and current         | <input type="checkbox"/> | <input type="checkbox"/> |
| Expectations are defined             | <input type="checkbox"/> | <input type="checkbox"/> |
| Financial picture is transparent     | <input type="checkbox"/> | <input type="checkbox"/> |
| Challenges are acknowledged          | <input type="checkbox"/> | <input type="checkbox"/> |
| Board/ED relationship is healthy     | <input type="checkbox"/> | <input type="checkbox"/> |
| Board is strategic (not operational) | <input type="checkbox"/> | <input type="checkbox"/> |
| Culture is constructive              | <input type="checkbox"/> | <input type="checkbox"/> |
| Reason for opening is clear          | <input type="checkbox"/> | <input type="checkbox"/> |
| My contribution is meaningful        | <input type="checkbox"/> | <input type="checkbox"/> |
| Onboarding and training exist        | <input type="checkbox"/> | <input type="checkbox"/> |

## Your Signal

- 8~10 clear → Strong board
- 5~7 mixed → Proceed carefully
- <5 concerns → Pay attention

*Before you say yes, get the tools and support you need at [StableAndGrowing.com](http://StableAndGrowing.com)*

## 10 Questions to Ask Before Joining a Nonprofit Board

Asking strong questions before you join protects you, strengthens the organization, and lays the foundation for well-governed organizations.

Bring these questions up in your first conversation or ask them before you accept. Wise board members don't simply say yes to a mission. They commit to stewarding it.





# Red Flags Checklist

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*Dysfunction Warning Signs*

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# Red Flags Checklist

## Dysfunction Warning Signs

Some answers don't just lack clarity, they signal risk.

Healthy Board



Dysfunctional Board



Not every nonprofit is healthy.

Most are well-intentioned. Many are doing genuinely important work. But governance dysfunction is more common than people realize. And it rarely introduces itself during the recruitment conversation.

No one opens with: “Before you join, let us walk you through our unresolved structural issues.”

The good news: most warning signs are visible — if you know where to look.

The goal here isn't suspicion. It's clarity. Joining a challenging organization with your eyes open is very different from



## Red Flags Checklist

discovering the problems three meetings in... while you're already on the Finance Committee.

Think of this as the fine print nobody handed you.

### **MISSION DRIFT OR CONFUSION**

- The mission is unclear, outdated, or rarely referenced in decisions
- Board members describe the organization's purpose differently
- Programs are driven more by available funding than mission alignment

#### **Why it matters:**

When the mission isn't clear, everything becomes reactive.

Boards stop setting direction and start debating activities.

### **FINANCIAL OPACITY OR INSTABILITY**

- Financial statements are difficult to obtain — or challenging to understand once you have them
- Persistent operating deficits without a clear recovery plan
- Heavy reliance on a single donor, grant, or funding source
- Weak or unclear internal financial controls

#### **Why it matters:**

Financial dysfunction doesn't stay in the background. It quietly becomes board-level responsibility.

You don't need to be an accountant — but you do need to ask good questions and expect clear answers.



## Red Flags Checklist

### **BLURRED GOVERNANCE AND MANAGEMENT ROLES**

- Board members regularly give direction to staff
- The Executive Director is either overly dominant... or noticeably sidelined
- Board meetings spend most of their time on operational details
- There is no formal Executive Director evaluation process

#### **Why it matters:**

When roles blur, trust erodes and accountability weakens.

The board ends up either running the organization... or avoiding it. Neither is governance.

### **HIGH BOARD OR STAFF TURNOVER**

- Multiple recent resignations from board members or senior staff
- Shortened or incomplete terms
- Ongoing difficulty recruiting qualified members
- Former board members are vague, diplomatic, or suddenly “very busy” when asked about their experience

#### **Why it matters:**

Turnover is rarely random.

When it's frequent, it usually points to deeper issues — culture, leadership, or both.

*(If former board members won't talk, that is... useful information.)*

## Red Flags Checklist

### **CONFLICT AVOIDANCE OR UNHEALTHY CONFLICT**

- Difficult issues are consistently avoided
- Decisions appear to be made before the meeting
- Strong personalities dominate without accountability
- Disagreement is treated as disloyalty instead of discernment

#### **Why it matters:**

Healthy boards engage in helpful disagreement. Dysfunctional boards either suppress it entirely...or turn it into a contact sport.

Both are problems.

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### **LACK OF ORIENTATION OR GOVERNANCE TRAINING**

- No onboarding process for new board members
- No written expectations or role clarity
- Limited understanding of fiduciary responsibilities
- “We train on the job” is considered a complete strategy

#### **Why it matters:**

A board that doesn't invest in its own effectiveness will struggle to lead, no matter how much it cares about the mission.

### **A WISE PERSPECTIVE**

Red flags call for attention — not panic. Some signal deep dysfunction. Others signal an organization in transition that may genuinely need thoughtful, prepared leadership.

The difference usually comes down to one thing:

#### **How leadership responds when you ask hard questions.**

- Honest about challenges? That's a sign of health.
- Defensive, vague, or dismissive? That's a red flag of its own.



# When to Say Yes Anyway

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*Joining a Board with **Eyes Wide Open***

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## When to Say Yes Anyway

### Joining a Board with Eyes Wide Open

Red flags don't automatically mean you should walk away.

Sometimes they signal dysfunction. Sometimes they signal an organization in transition. And sometimes, they signal an opportunity for exactly the kind of thoughtful, prepared board member you're becoming.

The question isn't only: **"Is this organization healthy?"**

It's also: **"Am I the right person, at the right time, for what this organization actually needs?"**

**Consider saying yes if:**

**The organization is honest about its challenges**

Leaders acknowledge problems openly rather than minimizing or deflecting them.

Transparency during recruitment is often the first — and most reliable — sign of health.

If they're willing to tell you what's hard before you join, they'll likely tell you what's hard after.

**There is a genuine willingness to improve**

You see evidence of forward movement: strategic planning underway, governance improvements, openness to board education, or engagement with outside support.



## When to Say Yes Anyway

An organization that knows it needs to grow can often be strengthened.

One that doesn't know, or doesn't care, is a different situation entirely.

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### ✓ **Your skills directly address a current gap**

If the board needs financial expertise, governance experience, fundraising leadership, or strategic clarity — and you can provide it — your presence may be part of the solution.

Just make sure you're being recruited for what you bring... not simply because you were the only one who didn't say no.

### ✓ **There is genuine alignment around mission and values**

Even in seasons of instability, shared commitment creates a foundation for recovery.

You can work through structural challenges.

Misaligned values are much harder to navigate—and rarely improve over time.

### ✓ **You understand the risk and are prepared for the work**

Joining a board in transition requires time, resilience, and the willingness to ask difficult questions... sometimes more than once.

Make sure your capacity matches the challenge.

Good intentions are helpful. They are not a strategy.



## When to Say Yes Anyway

Healthy governance is rarely accidental.

It is intentionally built incrementally and often imperfectly by people who show up prepared and stay committed.

If red flags are present, but leadership is humble, transparent, and genuinely committed to improvement, your service may be exactly what the organization needs.

If red flags are denied, minimized, or blamed entirely on circumstances or on people who are no longer there, proceed carefully.

Saying yes should be an informed decision.

Not an impulsive one.

Not a pressured one.

And not one made out of obligation.

You've asked the right questions. You've weighed the risks. Now let's talk about when to say no.





# When to Say No

*Knowing When the Answer  
Is Simply No*

## When to Say No

### Knowing When the Answer Is Simply No

Not every board invitation is the right one. That can be hard to admit, especially when the mission is compelling, the people seem genuine, and someone you respect is doing the asking.

But saying yes to the wrong board is not a neutral decision. It costs you time, energy, and credibility.

It may also cost the organization, because a board member who shouldn't be there rarely serves it well, regardless of their intentions.

Saying no thoughtfully is not a failure of generosity. It is an act of integrity.

#### Consider saying no if:

#### **✗ Leadership is defensive, dismissive, or dishonest when asked hard questions**

How an organization responds to honest questions *before* you join is a reliable preview of how it will respond after you join.

If the recruitment conversation feels more like a sales pitch — or you're positioned as "exactly who we need" without room for due diligence — pay attention.

That feeling is data.



## When to Say No

### ✘ **Multiple significant red flags are present, and met with denial**

One red flag with a clear, honest explanation is manageable.

Several red flags paired with a defensive shrug is something else entirely.

When concerns are minimized, blamed entirely on the past, or met with “that’s not really how it is,” trust what you observed, not what you’re being encouraged to overlook.

### ✘ **The time and energy required exceed your current capacity**

Poorly executed board service serves no one.

If this isn’t the right season for the level of commitment being asked, saying no now is far better than disengaging quietly six months in.

There is no downside to knowing your limits. There is a real cost in ignoring them.

### ✘ **Your values and the organization’s *actual* culture are misaligned**

Not the stated values, the lived ones.

The ones revealed in how decisions are made, how people are treated, and what is tolerated without comment.

When stated values and lived culture diverge, and the gap is meaningful, good intentions will not close it.



## When to Say No

### **✘ Your instincts are raising concerns you can't yet fully explain**

This one is harder to quantify — but experienced board members will tell you it belongs on the list.

If something feels consistently off during the recruitment process, pay attention.

You may not have the language for it yet. That doesn't mean it isn't real.

Due diligence matters. So does discernment.

Saying no to the wrong opportunity creates space for the right one. The nonprofit sector needs board members who are prepared, present, and genuinely aligned with the organizations they serve.

That sometimes means declining an invitation — graciously, respectfully, and without apology.

The missions that matter most deserve board members who chose them clearly.

Not ones who stayed because they couldn't find a polite way out.



## When to Say No

### Helpful Ways to Say No

**A simple way to say no:**

“Thank you for the invitation — I have a great deal of respect for the work, but after careful consideration, I don’t believe I’m the right fit for the board at this time.”

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**If you want a slightly warmer option:**

“I’m grateful for the invitation and the mission you’re pursuing. After thoughtful consideration, I’m going to step back, as I don’t believe I can contribute in the way the organization deserves right now.”

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**If you want one a bit more direct (but still professional):**

“Thank you for the opportunity. After reviewing the role and expectations, I’ve decided this isn’t the right fit for me at this time.”

Clear decisions build strong governance — even before you join.

Saying no isn’t failure, it’s discernment.





# First 90 Days Roadmap

*A Strategic Guide for New Board Members*

# First 90 Days Roadmap

## A Strategic Guide for New Board Members

Congratulations.

You asked the right questions. You spotted no deal-breaking red flags, or you spotted some and decided the opportunity was worth it anyway. Either way, you said yes with your eyes open.

Now the real work begins.

The first 90 days of board service will set the tone for everything that follows. Not because every decision you make in that window is permanent, but because the habits you form, the relationships you build, and the reputation you establish early tend to stick.

This roadmap assumes you are motivated, reasonably prepared... and possibly still wondering what exactly you've gotten yourself into.

That's normal.

Keep going.



## First 90 Days Roadmap

### **DAYS 1–30: LISTEN AND LEARN**

**Goal: Understand the organization, your role, and your legal obligations before you try to fix anything.**

**Review:**

- Mission, vision, and values
- Most recent annual report
- Strategic plan (or notes on why one doesn't exist yet)
- Bylaws and conflict-of-interest policy

**Meet informally with:**

- The board chair
- The Executive Director
- At least one experienced board member who isn't the most talkative person in the room

**Practice restraint:**

Attend your first board meeting as a listener and a learner.  
You will have opinions.

This is not yet the moment for all of them.

**Key question for this phase:**

*“What does this organization most need from its board right now, and where do I fit into that?”*



**DAYS 31–60: ENGAGE AND CONTRIBUTE**

**Goal: Become a confident, prepared, and consistently engaged board member.**

This is where you move from observer to participant, thoughtfully.

- Review the last two or three board packets and financial statements
- Join a committee aligned with your skills and interests
- Prepare and ask at least one governance-level question in a board meeting
- Make your first personal financial contribution (if expected)

**Practice:**

- Reading financial statements without quietly panicking
- Distinguishing between governance questions and operational opinions
- Contributing without dominating the discussion

**Key question for this phase:**

*“Am I governing — or am I managing? And do I know the difference yet?”*



## First 90 Days Roadmap

### **DAYS 61–90: LEAD AND REFLECT**

**Goal: Shift from learning mode to leadership posture.**

This phase is about contribution beyond attendance.

- Engage meaningfully in a strategic conversation or committee discussion
- Identify one specific way your expertise or network can advance the mission
- Accompany a staff member or board leader to a donor, partner, or community meeting (if appropriate and invited)

**Reflect honestly:**

- Where is this organization genuinely strong?
- Where is it most vulnerable?
- How can I contribute meaningfully, not just consistently, over the next year?

**Key question for this phase:**

*“What would faithful, effective board service look like for me here — and am I building toward that?”*



## First 90 Days Roadmap

By day 90, you are no longer new.

You are no longer just learning the culture. You are beginning to shape it. You are no longer finding your footing; you are finding your voice.

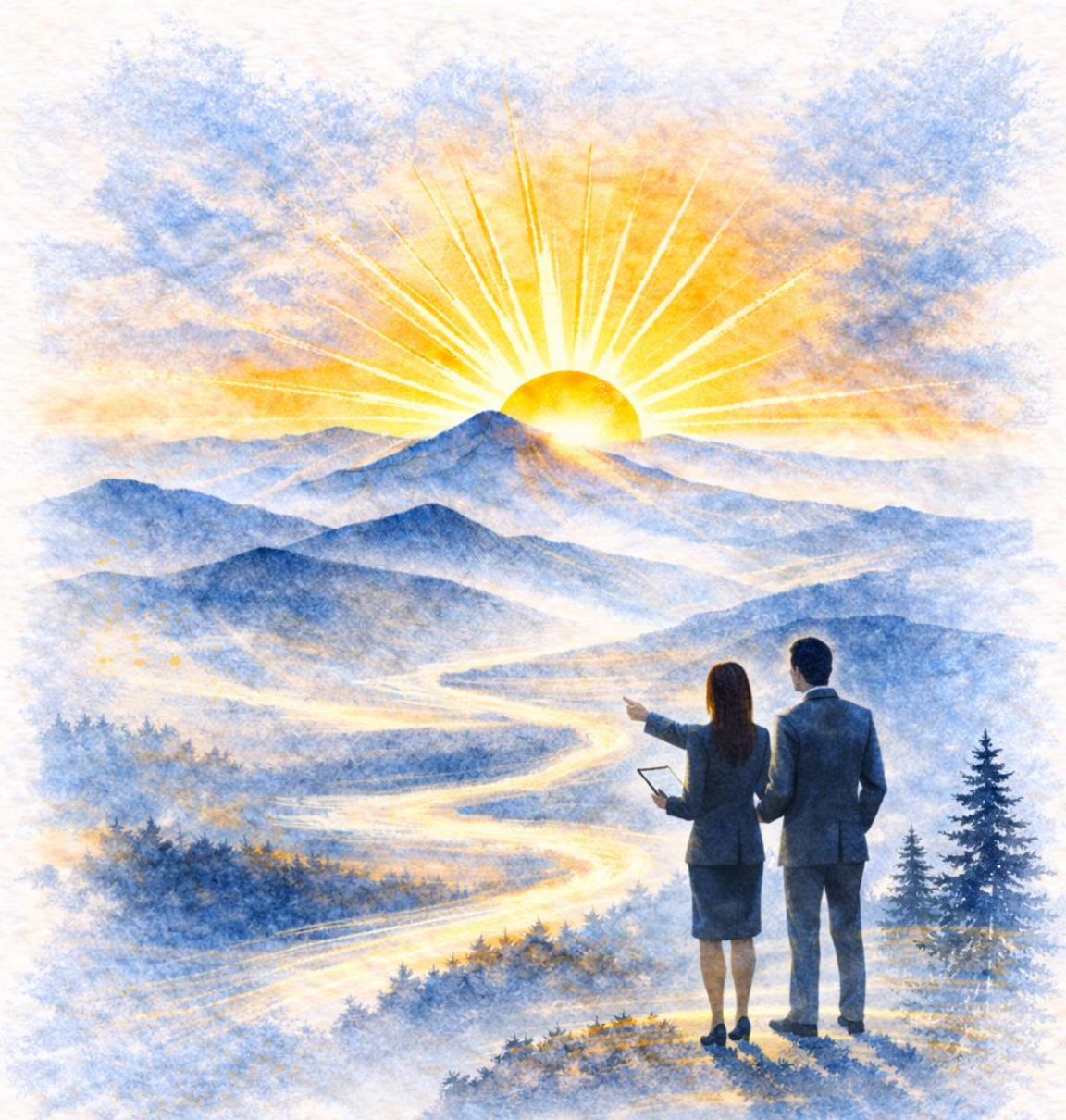
That is not a small thing.

Most board members never receive a roadmap. They figure it out slowly, through trial and error, and a few meetings they'd rather not revisit.

You don't have to.

**You are now prepared. Use it well.**





You Don't Have to  
Figure This Out **Alone**



## You Don't Have to Figure This Out Alone

Most people step into board service with good intentions... and far too little clarity.

You've already taken a different path. You've asked better questions. You've learned how to spot warning signs. You've thought more carefully about what it means to say yes—or no.

That alone puts you ahead of most board members.

But insight is just the beginning. Effective governance isn't a destination. It's a discipline.

But this is just the beginning. The real challenge isn't knowing what to look for; it's knowing how to apply it in real conversations, real meetings, and real decisions.

### **If this was helpful, here's the next step:**

I'm continuing to build practical tools and guidance for board members who want to serve well—without walking in blind.

If you'd like the next resources as they're released, **join here:** [StableAndGrowing.com](https://StableAndGrowing.com)

Strong boards are not accidental. They are built by people who show up prepared.

You're already doing that.

Stay in the loop.



## You Don't Have to Figure This Out Alone

If this guide was valuable, continue by:

### ① STAYING CONNECTED

#### Join the Stable & Growing Newsletter

Get practical governance insights you can actually use, delivered straight to your inbox.

No jargon. No filler. Just clear, useful guidance for people doing the quiet work of leading organizations that matter.



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## You Don't Have to Figure This Out Alone

### ② GO DEEPER

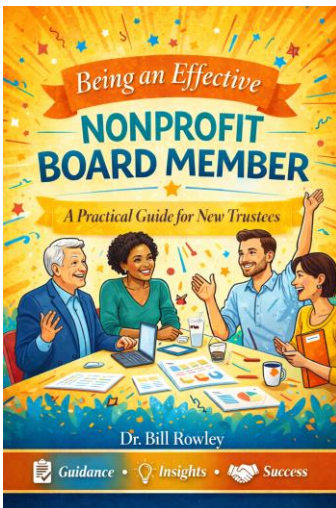
If you want the full playbook, this is it.

#### ***Being an Effective Nonprofit Board Member: A Practical Guide for New Trustees* — Dr. Bill Rowley**

This kit was designed to get you started. The book was written to take you further.

From financial oversight to strategic leadership... From navigating boardroom dynamics to knowing when to step forward, and when to step back...

It covers the full arc of effective board service in the same practical, insightful way you've come to know here.



→ Available on Amazon:  
[amazon.com/dp/B0GJ5M179Y](https://amazon.com/dp/B0GJ5M179Y)

## You Don't Have to Figure This Out Alone

### ③ BRING THIS TO YOUR BOARD

#### Board Training and Consulting

If your board needs alignment, not just information, we can help.

Board training, governance assessments, and consulting designed for organizations that want to lead with clarity, integrity, and confidence.

→ [StableAndGrowing.com/board-training](https://StableAndGrowing.com/board-training)

#### Next Step:

If this helped you think differently about board service, there's more practical guidance at [StableAndGrowing.com](https://StableAndGrowing.com).

Good governance rarely makes headlines.

But its presence — or absence — shapes everything.

Thank you for taking it seriously.

Printed copies of this Survival Kit can be purchased at:

<https://www.amazon.com/dp/B0GVK47DZ1>



## About the Author

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Dr. Bill Rowley is a nonprofit founder, executive, and governance consultant with decades of experience leading and advising organizations across multiple sectors.

He has served on nonprofit boards, served as President and Executive Director for nonprofits worldwide, led capital campaigns, and worked alongside Executive Directors and board leaders, navigating the full range of challenges that come with starting and running mission-driven organizations.

His work through Stable & Growing helps nonprofits build healthier boards, stronger leadership, and more sustainable futures.

He wrote this kit — and the book it points to — because good governance matters, and too many people are asked to practice it without ever being prepared for it.

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***Good governance changes organizations.  
Prepared board members make it possible.***