

Navigating Board Governance Across the Nonprofit Lifecycle

Aligning Board Practices with Organizational Growth & Change



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PRESENTERS



Ginny Waller



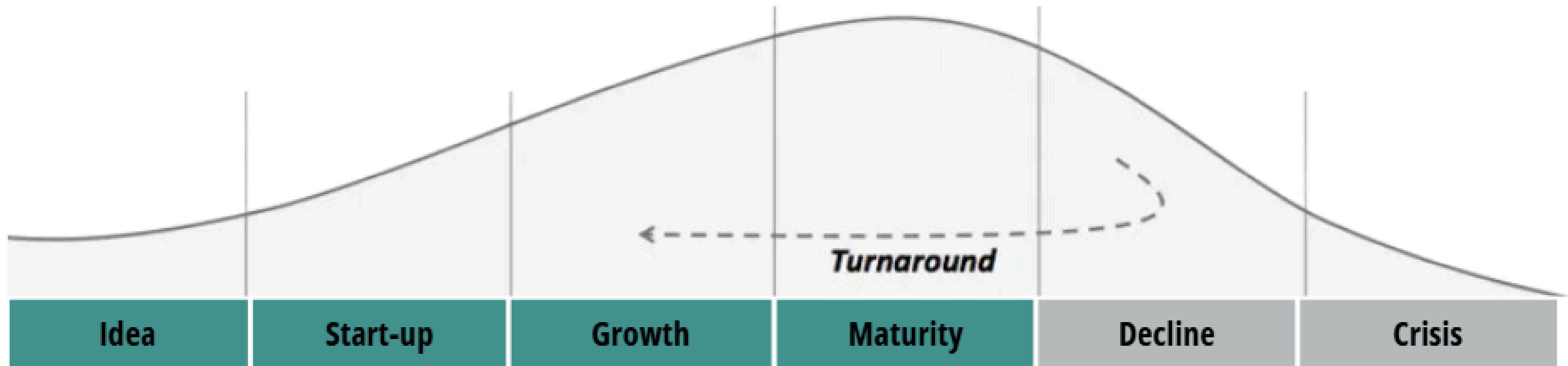
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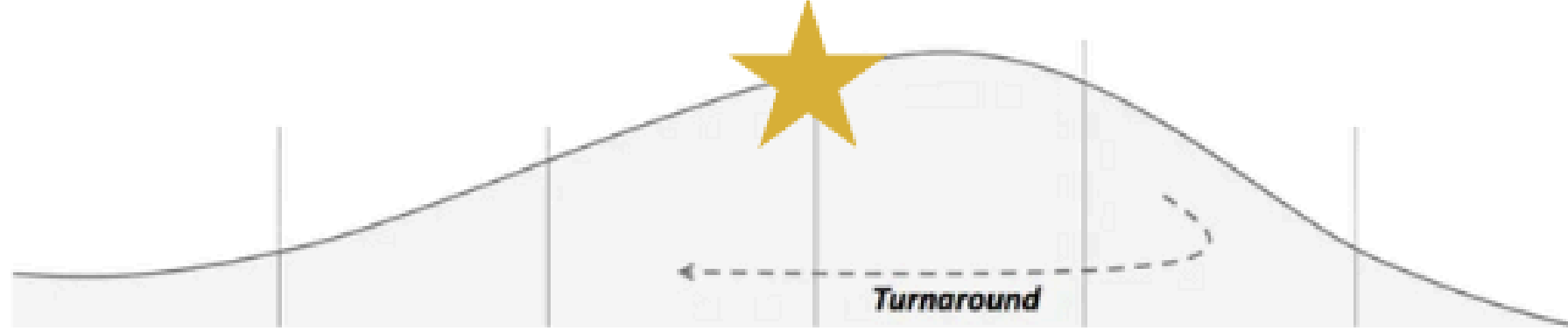


LEARNING OBJECTIVES

1. Understanding the characteristics and governance needs of each lifecycle stage.
2. Strategies for transitioning boards from one stage to the next.
3. Tools for assessing and improving board performance.
4. Best practices for maintaining board engagement and effectiveness throughout the lifecycle.
5. Practical examples and templates for implementing governance improvements.

The Nonprofit Lifecycle





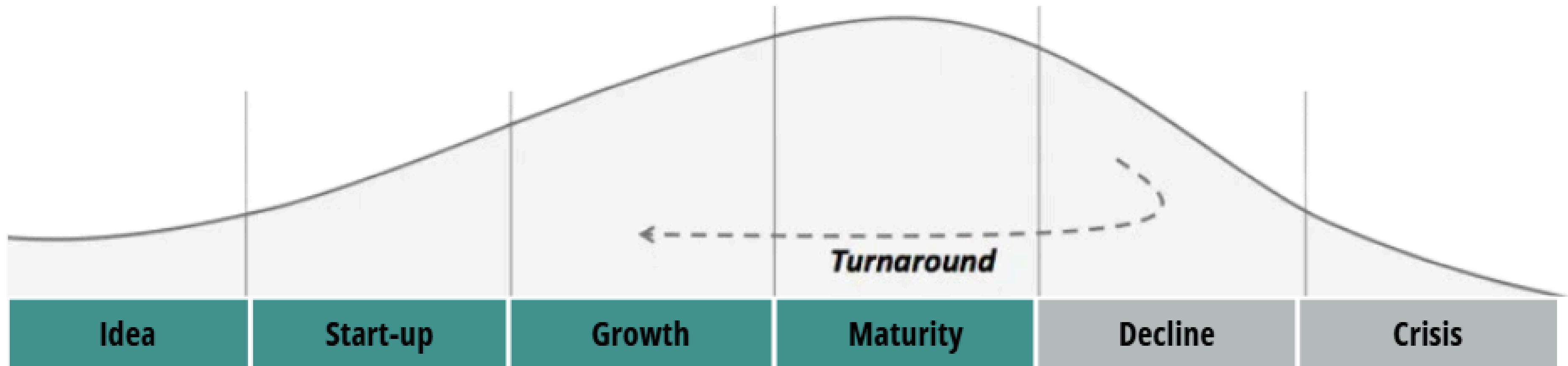
Stevens' Nonprofit Lifecycle Stages

	Idea	Start-up	Growth	Maturity	Decline	Crisis
Impact	Informal - Need established, best practices integrated, pilot launched	Pilot successful - Lessons integrated into design; Measurement starts	Established in marketplace - Strong results, partner-of-choice & consistent delivery	Consistent results through robust evaluation; Focused on continuous improvement, scale, system-building	Need exists, but nonprofit isn't partner-of-choice; Market duplication from other orgs	Demand near zero; Intense competition for resources & energy
Brand	Not utilized	First official PR materials; Primary method of marketing is work-of-mouth	Build-out of marketing & communication need, including public & media relations	Sophisticated marketing & comms plan using multiple channels; Everyone equipped to tell the story	Decreased public interest; Issue are not discussed in the media	Unable to attract media or public attention; Messaging does not resonate with public
Revenue	Most are in-kind	Limited financial resources; hand-to-mouth	More diverse financial resources with established relationships with funders, but still unpredictable	High financial diversity with established relationships with multiple funders; Endowment exists; High financial predictability	Funders are not renewing contracts; Low cash reserves; Decreasing donor retention & loyalty	Cash reserves insufficient to cover operating expenses; Long-time donors tapped out
Operations	Entrepreneurial founder using volunteer resources for guidance	Flat organization - decisions are likely made by founder; Volunteers needed for hands-on support	Founder has hired or becomes ED and is key decision-maker with board guidance; Volunteers used as resources	Leadership is often 2 nd or 3 rd generation from founder; Clear division of labor & accountability among staff	Increasing turnover; Decreased ability to attract top talent	Inability to fill key roles
Culture	Culture is defined by the Founder	Culture is action-oriented	Increased division of labor & accountability as staff is hired; Culture is results-oriented	Culture is well-defined and serves as a competitive advantage; Volunteers seen as ambassadors	Decreased transparency	High contention & division among staff; Mistrust of leadership
Governance	Not yet developed	Formal governance starts; Likely homogenous	Board expansion - more diversity with more focus on planning & oversight	Board focused on policy & strategy; Board delegates management to ED	Board members are hard to recruit, retain & engage; Low focus on strategy	Board not fulfilling fiduciary responsibilities

WHY GOVERNANCE MATTERS

- Governance = sustainability, accountability, mission alignment
- “Creates the container” for strategy, leadership, and impact to thrive
- Keeps power ethical.

Governance Across the Lifecycle





Stage: Idea

Typical Governance Characteristics:
Not yet developed

Practical Governance Strategies:
Formalize a board with clear bylaws,
roles, and expectations

Stage: Startup

Typical Governance Characteristics:

Formal governance starts;

Likely homogenous

Practical Governance Strategies:

Expand board diversity, skills, and role
in strategic planning



Stage: Growth

Typical Governance Characteristics:
Board expansion - more diversity, more
focus on planning and oversight

Practical Governance Strategies:
Ensure board focus on governance, policy,
and long-term strategy;
Improve structure and processes

Stage: Maturity

Typical Characteristics of Governance:
Board focused on policy and strategy;
Board delegates management to ED

Practical Governance Strategies:
Reassess structure for efficiency;
Invest in board development;
Ensure updated succession,
emergency, and disaster planning



Stage: Decline

Typical Characteristics of Governance:
Board members are hard to recruit,
retain and engage; Low focus on strategy

Practical Governance Strategies:
Rebuild accountability and ensure
fiduciary responsibilities are met;
Reengage board members with
meaningful work;

Sharpen strategic oversight



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Stage: Crisis

Typical Characteristics of Governance:
Board not fulfilling fiduciary
responsibilities

Practical Governance Strategies:
Recruit new leadership aligned with
organizational turnaround

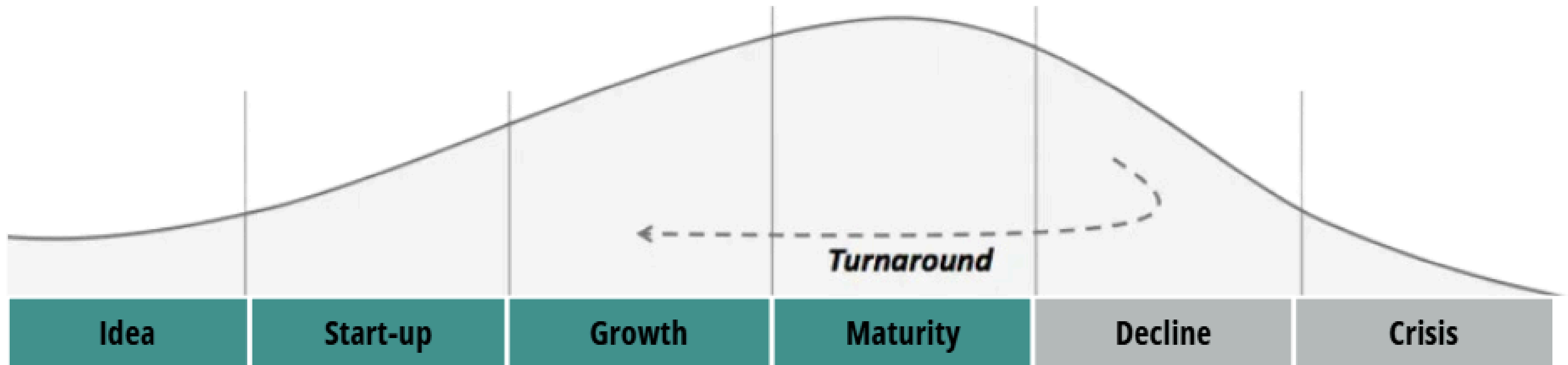


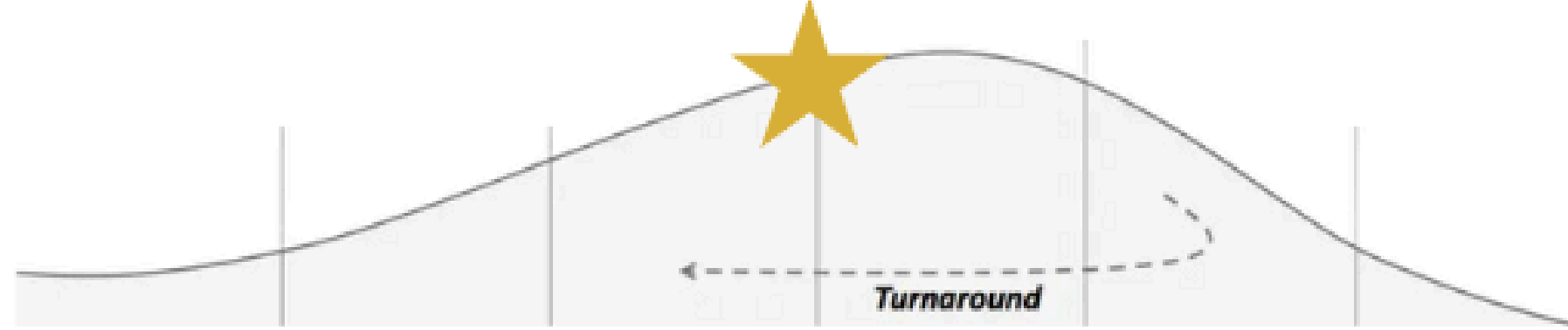
DIAGNOSTIC TOOL

What lifecycle stage is your
Governance in?



Let's Share





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Looking at the Full Lifecycle

IMPLEMENTATION STRATEGIES



**Align with best
practices**



**Engage reluctant
or fatigued
boards**



**Build equity &
inclusion**

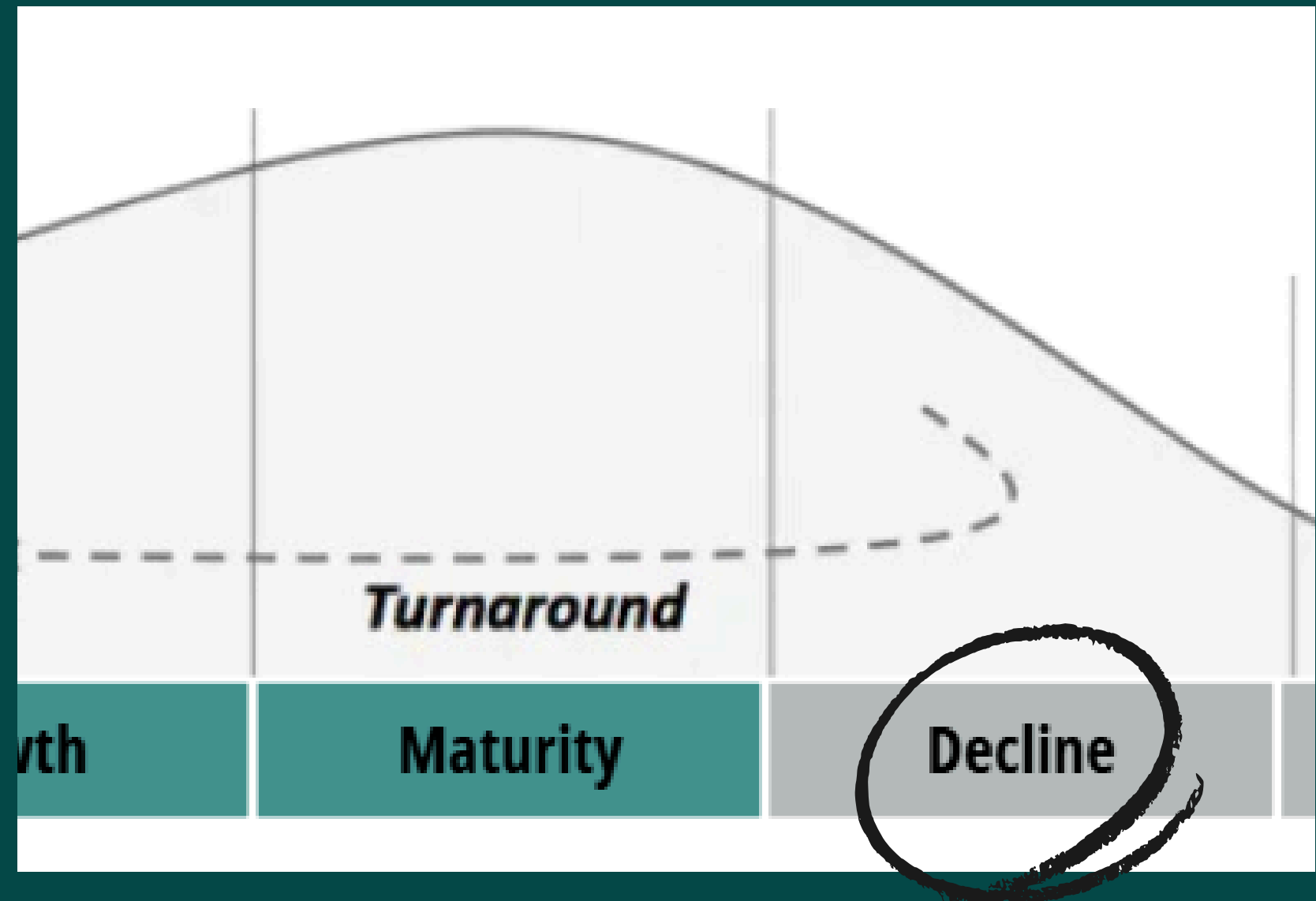
Case Study From Decline to Turnaround

The Board That Found Its Backbone



Lifecycle Snapshot

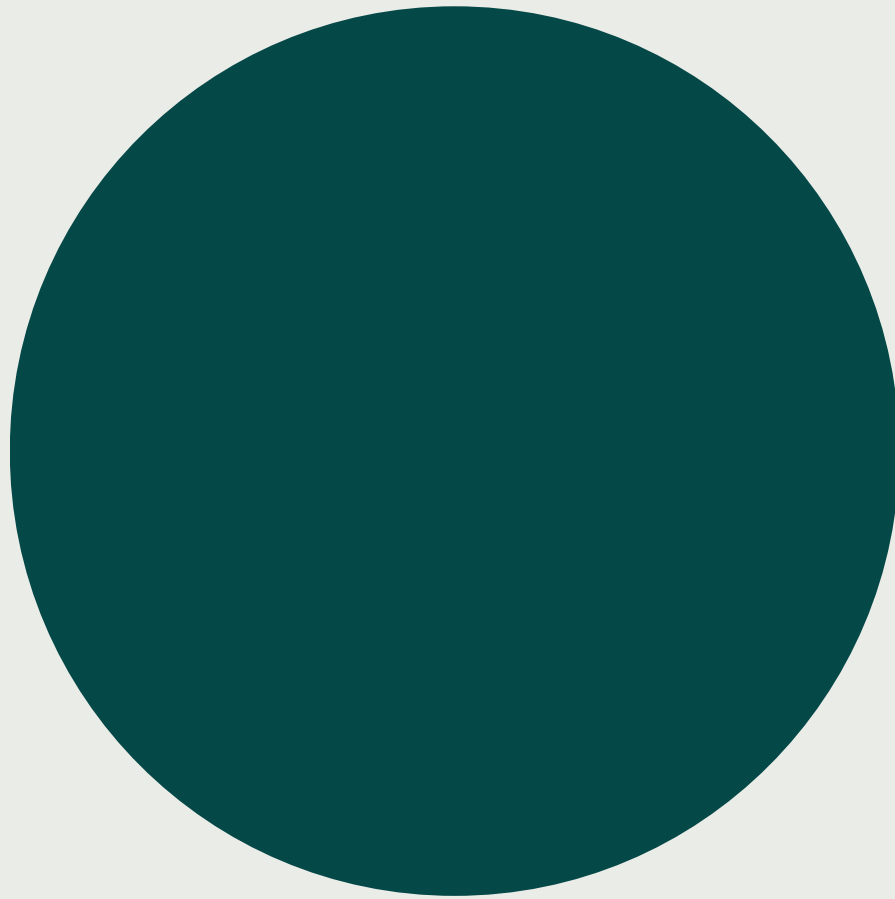
- Mid-sized human services nonprofit (\$1.5M budget)
- Founder departure → fatigue & drift
- Board disengaged, unclear roles, outdated bylaws
- Operations thriving, governance lagging



What We Found

Symptoms	Impact
No active committees	No shared accountability
Stale recruitment	Homogenous, low energy board
Outdated bylaws	Decisions made by default
No performance reviews	ED isolated and unchallenged

REBUILDING THE CONTAINER



Structure:

governance reset retreat,
committee redesign



Accountability:

term limits, evaluation,
officer succession



Engagement:

Role mapping,
recommitment, mission
focus

The Turnaround

Before:

- 52% meeting attendance
- 0 active committees
- 0 new recruits in 3 years

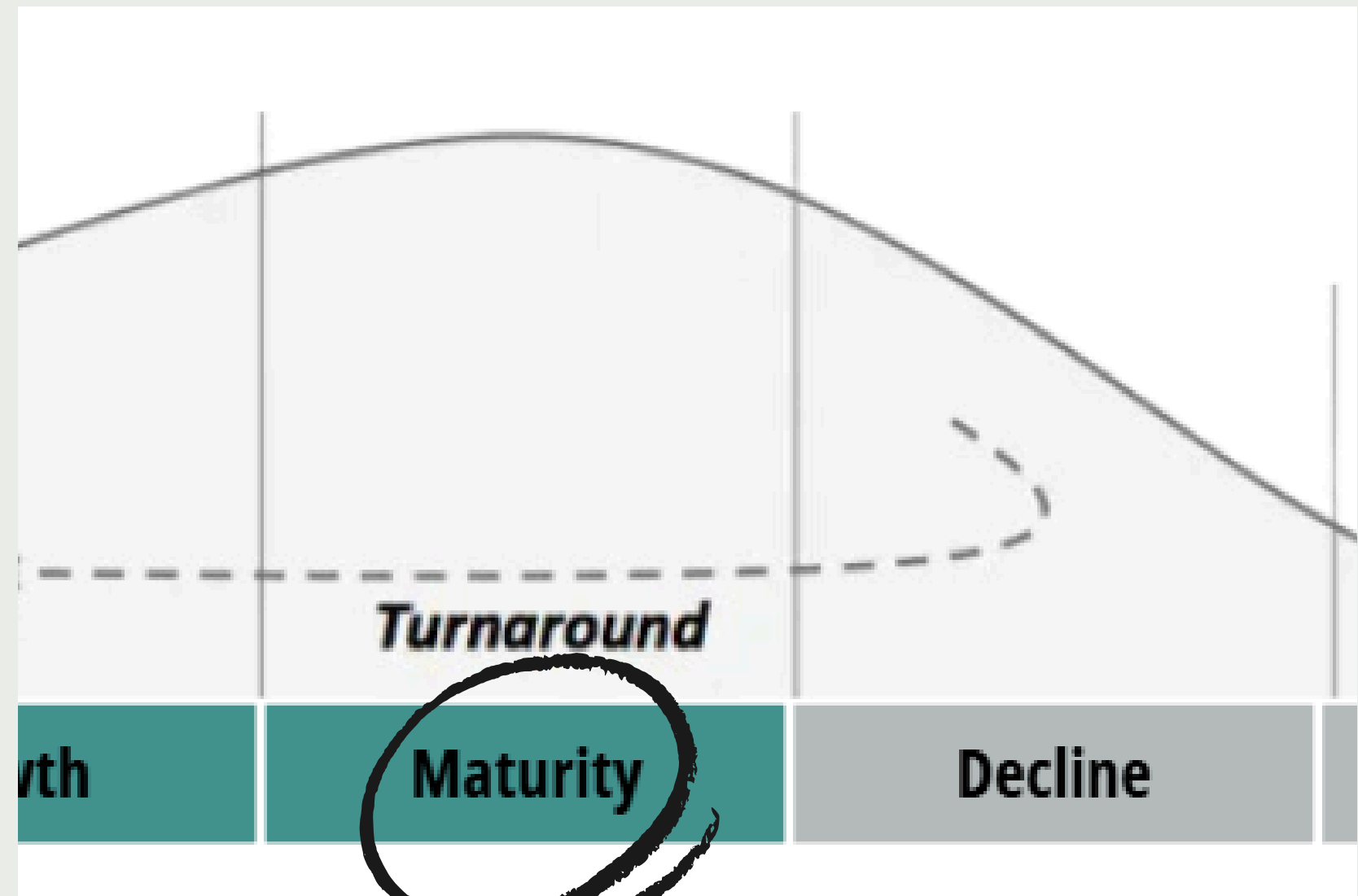
After (6–18 months):

- 90% attendance
- 2 new committees, 2 new skilled members
- Board initiated planned giving



LESSONS FROM THE LIFECYCLE

- Governance declines before programs do.
- You can't recruit your way out of dysfunction — you have to reset.
- Turnaround starts when someone names the truth.



Recognize governance needs at each stage.

Apply tools/templates for assessment & planning.

Implement strategies for engagement & sustainability.

What is one governance priority you want to take back to your board?



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NEXT STEPS



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Take the
Conference Evaluation



DIY Planning for Small Teams with Big Dreams

Strategy Isn't Just for the Big Dogs



PivotPoint
STRATEGY

Live, Virtual Event

9:00 am - 5:00 pm

December 9

**Use code NCCN
for 20% off**

\$497 includes access to the
workshop, workbook, and
implementation template!



THANK YOU!



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Building Capacity to Dream

GINNY WALLER, J.D.

 ginny.waller@capacitytodream.com

 Remote | VA

ALYSON CULIN

 alyson@bluehillstrategies.com

 Remote | NC

