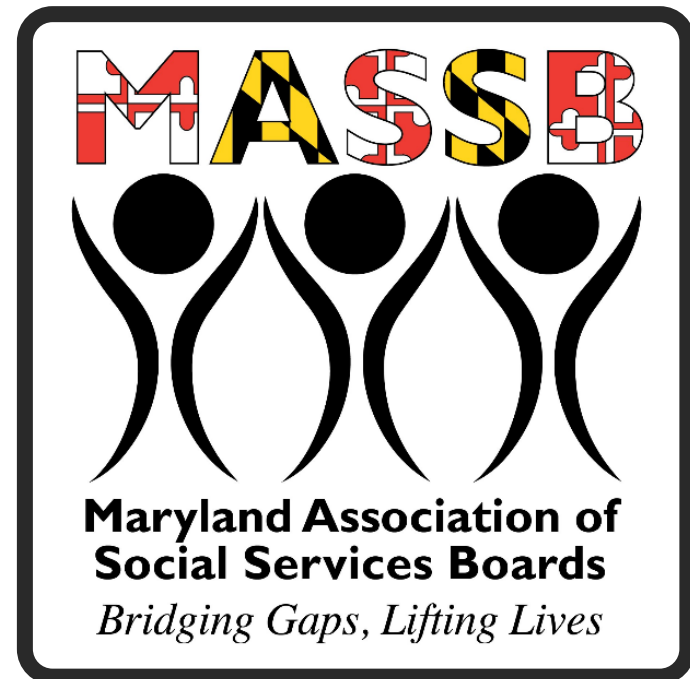


New Board Member Training

MASSB Annual
Conference
October
16, 2025

Our Mission

We provide resources that support
at-risk families, children and
vulnerable adults.



Bridging Gaps, Lifting Lives
Social Services Boards
Maryland Association of

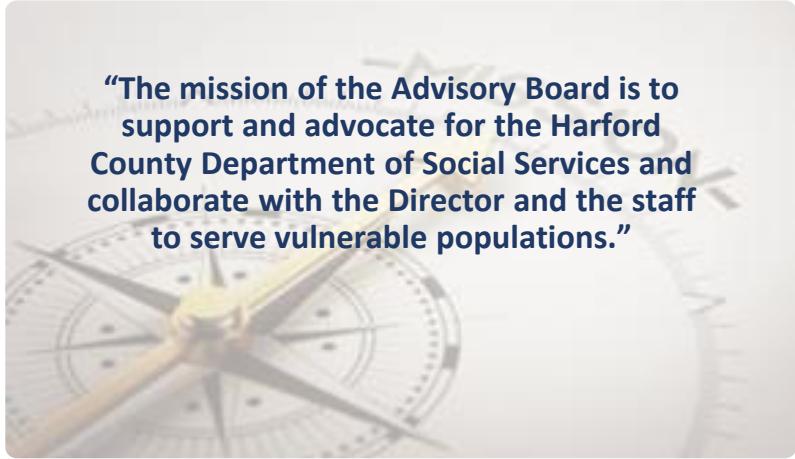
Board Management



Strategic Board Membership Development

Develop a Board Handbook that includes the following components:

- Succinct background description of the board in relation to the department of social services
- Vision and Mission statements
- Board member characteristics
- Goals and Objectives
- Department of Social Services services and contacts
- Board profile evaluation and recruitment plan



“The mission of the Advisory Board is to support and advocate for the Harford County Department of Social Services and collaborate with the Director and the staff to serve vulnerable populations.”



“The Advisory Board will be the leading supporter of the local Harford County Department of Social Services and serve as the role model for other advisory boards across the state.”

Develop Vision and Mission Statements

Develop a clear succinct Vision and Mission statements. This is a very important focus that may also require more time for discussion and statement refinements.

- An Example -

"The mission of the Advisory Board is to support and advocate for the Harford County Department of Social Services and collaborate with the Director and the staff to serve vulnerable populations."



Board Member Characteristics

Responsibilities

- Understand and promote the Agency's mission
- Be familiar with the Agency's programs
- Be a working member of at least one board committee
- Participate in resource development and fundraising
- Identify and assist in the cultivation of potential contributors
- Educate the community about DSS services and programs
- Review board materials prior to the meeting
- Identify any potential conflicts of interest
- Participate in required Agency committees (i.e. Board Development and Recruitment)
- Maintain confidentiality
- Etc.



Orientation and Development

Orientation of New Members

- Outline expectations, job descriptions, and participation policies (Board Handbook)
- Some Major Topics
 - Mission and values
 - Programs
 - Board members roles and responsibilities
 - Legal context and policies
 - Financial oversight

Development of Board Members

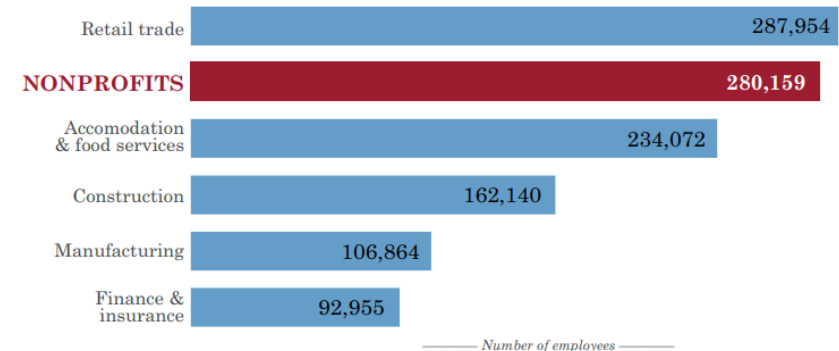
- Training opportunities during meetings or via external opportunities

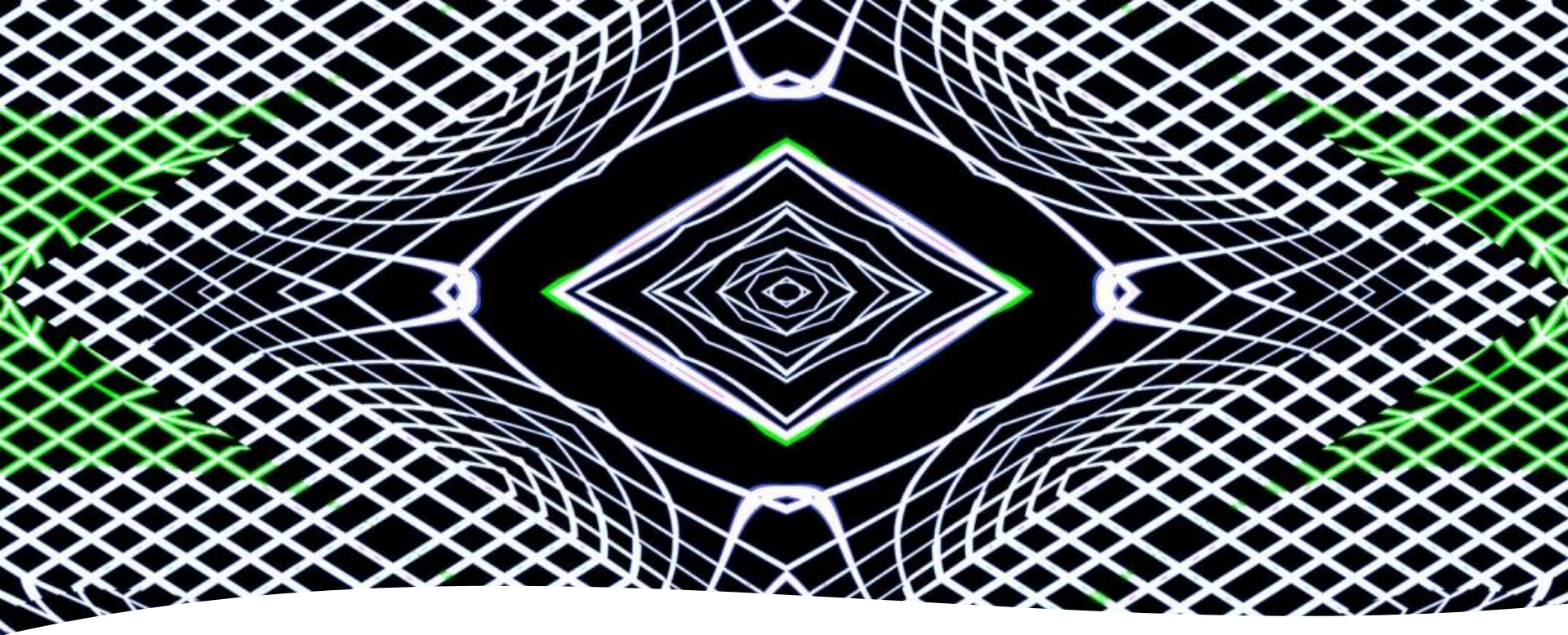


MARYLAND nonprofits by type, 2019

501(c) Type	# of orgs	Share of orgs
501(c)(3)	30,880	82.8%
501(c)(4)	1,537	4.1%
501(c)(6)	1,145	3.1%
501(c)(7)	1,448	3.9%
501(c)(8)	632	2.0%
501(c)(19)	457	1.2%
Other 501(c)	3,733	10.0%
ALL NONPROFITS	37,296	

Maryland nonprofit employment vs. employment in major for-profit industries, 2017





Budgeting and Monitoring

- **Budget's Strategic Context**
 - Budget needs to reflect the strategic priorities of the organization
- **Monitoring**
 - Done through the finance committee
 - Provide rationale for significant variances between budgeted and actual amounts
 - **Statements**
 - Activities: performance
 - Position: worth



A **friendraiser** is a strategy that prioritizes building relationships to attract long-term supporters, while a fundraiser's primary goal is to make money immediately. A friendraiser event focuses on raising awareness and enthusiasm for a cause, with the ultimate goal of turning attendees into donors in the future.

Analysis and Fundraising

Basic Rules

- *The percent of total expenses that are used for program activities should be reasonable given the organization's business model.*
- *For every dollar spent on fundraising, the organization should raise three dollars.*

Fundraising

- **Success can vary based on name recognition in the community and charitable purpose.**
- **Assess in terms of financial risk.**
- **Make expectations clear to new board members.**

Fundraising

Activity	Why It's Effective	Implementation Tips
• Annual Giving Campaigns with Impact Stories	• Donors connect strongly to real people and visible outcomes. Emotional storytelling about clients served, families stabilized, or youth empowered inspires giving.	• Feature short client success stories in emails, postcards, and videos; show how each gift level directly helps ('\$50 feeds a family for a week').
• Community Appreciation or Awareness Events	• Builds trust and loyalty while recognizing donors, volunteers, and resource families. Encourages repeat giving and word-of-mouth support.	• Host annual dinners, picnics, or 'Day of Thanks' for families and volunteers; secure local sponsorships to offset costs.
• Peer-to-Peer Fundraising (Ambassador Drives)	• Supporters who share their personal connections to your cause bring new donors and credibility.	• Recruit ambassadors (board members, alumni families, caseworkers); provide easy-to-share online fundraising pages.
• Grant Writing and Foundation Partnerships	• Many foundations prioritize child welfare, family stability, and housing assistance.	• Build a grant calendar, track outcomes data, and reuse successful narrative sections across proposals.
• Corporate Sponsorships & Workplace Giving	• Local employers appreciate opportunities to give back and align with community impact.	• Offer tiered sponsorship packages (e.g., bronze, silver, gold); highlight sponsors at events and on social media.

48 FUNDRAISING IDEAS FOR NONPROFITS



GET SPORTY

- GOLF FOR GOOD
- RUN FOR A CAUSE
- BIKE FOR A CAUSE
- LAWN SPORT OLYMPICS
- RELAYS + CHALLENGES

GET TOGETHER

- WORKPLACE GIVING
- PENNY DRIVE
- BOX TOPS FOR GOOD
- SHOE DRIVE
- E-WASTE DRIVE

TEAM UP

- EMBARRASS THE BOSS
- CAUSE MARKETING CAMPAIGN
- RESTAURANT PARTNERSHIP

AUCTION IT

- GUESS THE AMOUNT
- SILENT AUCTION
- 50/50 RAFFLE
- PENNY AUCTION
- LIVE AUCTION
- ONLINE AUCTION

GO CLASSIC

- RUBBER CHICKEN DINNER
- POKER/CASINO NIGHT
- HAPPY HOUR
- WINE TASTING
- BE THE BARTENDER
- TRIVIA NIGHT
- FOOD TASTING
- DOG/CAT SHOW
- ART SHOW
- GROW FOR GOOD

THINK OUTSIDE THE BOX

- DUCK RACE
- KARAOKE NIGHT
- POLAR BEAR PLUNGE
- CUPCAKE WARS
- DOG/CAR WASH
- GOODSEARCH.ORG
- AFFILIATE ADVERTISING
- ONLINE REAL ESTATE
- SPONSORED BRICK OR WALL
- GIFT WRAPPING
- COMBINED FEDERAL CAMPAIGN
- RECIPE BOOK
- ODD CHALLENGE
- GIFTS FOR GOOD
- HAUNTED HOUSE
- BRANDED FOOD
- COFFEE/BAKE SALE
- BRANDED MERCH
- CAUSE-OPOLY

FULL GUIDE TO DIGITAL FUNDRAISING:



WHOLEWHALE.COM/
DIGITAL-FUNDRAISING/

Financial Management

Local Boards may deposit checks and cash directly into the MASSB checking account. Donations may also be received via website at www.massbfoundation.org

Local Boards must notify the MASSB Foundation Treasurer when funds are deposited or donated via the website

Local Boards must keep internal records of income and expenses and balance with the MASSB official records quarterly

Local Boards must also keep and report metrics information



Requesting Funds

Reimbursement:

- Funds will come directly out of your MASSB Held Account. When you request funds from this account you've already paid the invoices or you will pay them as soon as the check arrives. You send us an email with the WDR see slide _____ and copies of the invoices (you've paid or will pay shortly) and we send you a check for the **exact amount**.

Pro:

- The Reimbursement method** is easier to keep track of funds spent.

Con:

- The Reimbursement method** is slightly slower. It will take a few days for your check to arrive.



Withdrawal Request Form

For Requesting Disbursements from the MASSB Foundation
(to be customized to justify the request and to identify the payor, with
Schedule 1 being required for government year-end tax reporting):

MASSB Foundation
Attn: Foundation Treasurer
80 West Street Stead
Annapolis, MD 21401



Withdrawal Request Form:
Dated _____, 20____

Re: Withdrawal of Funds

To Whom it May Concern:

Please be advised that the Board of Directors for the _____ County Department of Social Services has duly approved resolutions authorizing and recommending to the Community Foundation the release of \$ _____ from our [_____ MASSBF Held _____ OR _____ DSS Local Advance _____] account within the MASSB Foundation.

Our Board of Directors represents and covenants that the funds being disbursed will be used solely for the purpose of paying expenses associated with the following program that is consistent with the charitable purpose of the mission of the _____ County Department of Social Services: _____. Specifically, the disbursement advances child protection or family preservation expenses, that are not otherwise governmentally funded, in the following way(s): _____

We certify that the financial information set forth in Schedule 1 is, to the best of our knowledge, true and accurate for tax reporting purposes. Note that applicable tax laws now require Schedule 1 in order for us to process a withdrawal request.

The funds being requested should be made payable to _____, and should be mailed to the following person:
[Debbie](#)

<Street Address>

<City> _____ <State> _____ <Zip> _____

Invoice #: _____ <If applicable to facilitate payment>
Please send the undersigned an email (to _____@_____.org) as confirmation of payment to the above.

Updated 03/05/2025
MASSB Foundation Resource: For Requesting Disbursements from the MASSB Foundation

Best regards,

Signature: _____ Signature: _____ *

Printed Name: _____ Printed Name: _____ *

* include 2nd signature only if local board adopts resolutions to require that for enhanced security.

[NEW PAGE]

MASSB FOUNDATION Withdrawal Request

Schedule 1: Information about Disbursement Request

Category of Expense (from Form 990 by Row #)	Fundraising Expense	Program (Services) Expense
22. Grants and Allocations	\$ _____	\$ _____
26. Salaries and Wages	\$ _____	\$ _____
30. Professional Fundraiser	\$ _____	\$ _____
31. Accounting Fees	\$ _____	\$ _____
32. Legal Fees	\$ _____	\$ _____
33. Supplies (including software)	\$ _____	\$ _____
34. Telephone	\$ _____	\$ _____
35. Postage and Shipping	\$ _____	\$ _____
36. Occupancy	\$ _____	\$ _____
37. Equipment and Maintenance	\$ _____	\$ _____
38. Printing and Publishing	\$ _____	\$ _____
39. Travel (food, tip , laundry)	\$ _____	\$ _____
40. Conferences and Meetings	\$ _____	\$ _____
43. Other -- Insurance	\$ _____	\$ _____
43. Other - Admin Fee (prog copy)	\$ _____	\$ _____
TOTAL	\$ _____	\$ _____

Updated 03/05/2025
MASSB Foundation Resource: For Requesting Disbursements from the MASSB Foundation

BASIC NEEDS: \$ _____ Number of people assisted: _____
HEALTH & SAFETY: \$ _____ Number of people assisted: _____
OPPORTUNITIES & GROWTH: \$ _____ Number of people assisted: _____
OTHER: \$ _____ Number of people assisted: _____

Updated 03/05/2025
MASSB Foundation Resource: For Requesting Disbursements from the MASSB Foundation

Allowable Expenses for Boards

Allowable Expenses for Boards

Basic Needs	Growth & Opportunity
Clothing (if not job related)	Angel Tree gifts
Emergencies (e.g. hotel stays, plumbing)	Bus passes and UBER/LIFT/taxi rides
Food and Meals	Car repairs, insurance, payments
Rental, mortgage and tax arrearages	Clothing/shoes for work
Security Deposits and 1st Month's Rent	Customer Incentive Program (w/DSS)
Utilities Arrearages	Driver's Ed for teens and adults
Health & Safety	Customer education, job training, licenses
Hearing Aids	Govt docs (birth certificates, IDs)
Home modification and repair	School Supplies
Hygiene products and toiletries	Sports (uniforms, fees, etc)
Medical costs and Prescriptions	Summer Camp for at-risk youth
Oral care	Support for Family Service Centers
Sanitation/ Cleaning for seniors	Support provided to senior centers
Support for Child Advocacy Centers	Tutoring for Children
Support for domestic violence shelters	Other
	DSS Staff & community education
	Public awareness activities

Gift Cards:

Gift cards are not the preferred method of providing assistance however, in some circumstances they are the only viable way to help a customer. To minimize the risk of misuse, gift cards must be logged and inventoried, using segregation of duties processes. If provided directly to a customer, they must be signed for. Circumstances where a gift card may be appropriate are:

- For groceries
- To provide a homeless family a holiday meal at a restaurant
- To purchase gasoline
- In support of a DSS managed incentive program (e.g., for adults maintaining employment)

Performance Evaluation

Purpose

- **Maintain and improve board quality from an individual and leadership perspective**

Methods

- **Questionnaire rating how well the board fulfills its functions**

Review

- **Review/assess results and take actions accordingly**

- ____ (insert date) Trustee responses due
- ____ Governance Committee reviews responses
- ____ Executive committee reviews response highlights
- ____ Scheduled time at the board meeting for a full discussion
- ____ Gov/Exec Comm. discusses "follow-ups" from board evaluation discussion

1. The Board knows and understands ____'s values, mission, strategic plan and operating plans.

☐ Strongly Agree ☐ Agree ☐ Disagree ☐ Strongly Disagree ☐ Don't Know

2. Trustees reflect this understanding in the decisions they make on key issues throughout the year.

☐ Strongly Agree ☐ Agree ☐ Disagree ☐ Strongly Disagree ☐ Don't Know

3. The strategic rationale for proposed actions is adequately explained.

☐ Strongly Agree ☐ Agree ☐ Disagree ☐ Strongly Disagree ☐ Don't Know

4. There is an effective system of controls in place for safeguarding assets, managing major risks and identifying critical issues and trends?

☐ Strongly Agree ☐ Agree ☐ Disagree ☐ Strongly Disagree ☐ Don't Know

5. The Board is doing an adequate job of evaluating the performance of the President on a regular basis?

☐ Strongly Agree ☐ Agree ☐ Disagree ☐ Strongly Disagree ☐ Don't Know

6. If there is one change I would make to the way the board operates, it is ...

7. Other comments?

Recruitment and Vetting

- **Context: Board Composition**
 - No fewer than 5-7 unrelated individuals who are
 - personally committed to the mission of the organization
 - collectively reflect the characteristics of the community served by the organization
 - volunteers, serving without compensation other than reimbursement, if applicable
- **Focus and Tool: Recruitment**
 - Within the context of community needs and board turnover
 - evaluate the skills, expertise, and demographic background of board members
 - use a board membership matrix for assessment and strategic recruitment

Some Facts

Average board size 15
and median size 13
according BoardSource

Size and Function

Function Drives
Structure

Large v Small Boards

Board member
engagement

Scheduling

Accountability

Work Load

A high-angle, top-down photograph of a diverse group of people of various ages and ethnicities. They are all leaning in from the edges of the frame, with their hands stacked on top of each other in the center, forming a human pyramid. The group includes two older adults at the top: a woman with glasses and a striped shirt, and a man with glasses and a green cardigan. Below them are several younger people, including a person in a bright yellow long-sleeved shirt. The hands are of different skin tones, and some people are wearing watches or rings. The background is a plain, light-colored floor. The overall mood is positive and collaborative.

Source: Nine Steps to Finding, Recruiting, and Engaging Nonprofit Board Members, by Berit M. Lakey. BoardSource, 2007.

Board Membership Matrix

Board Matrix Worksheet	# of Current Members	# of Prospective Members	Total Members
Areas of Expertise/Leadership Qualities			
Administration/Management			0
Early-stage organizations/start-ups			0
Financial oversight			0
Fundraising			0
Government			0
Investment management			0
Law			0
Leadership skills/motivator			0
Marketing, public relations			0
Human resources			0
Strategic planning			0
Physical plant (architect, engineer)			0
Real estate			0
Understanding of community needs			0
Technology			0
Other			0
Resources			
Money to give			0
Access to money			0
Access to other resources (foundations, corporate support)			0
Availability for active participation (solicitation visits, grant writing)			0
Community Connections			
Religious organizations			0
Corporate			0
Education			0
Media			0
Political			0
Philanthropy			0
Small business			0
Social services			0
Other			0

Personal Style			
Consensus builder			0
Good communicator			0
Strategist			0
Team member			0
Visionary			0
Age			
Under 18			0
19 – 34			0
35 – 50			0
51 – 65			0
Over 65			0
Gender			
Male			0
Female			0
Race/Ethnicity			
African American/Black			0
Asian/Pacific Islander			0
Caucasian			0
Hispanic/Latino			0
Native American/Indian			0
Other			0

Recruitment and Vetting

- **General Recruitment Approaches**

- County website
- Print and social media
- Word of mouth via board member contacts
- Local groups such as Lions Clubs, NAACP Chapters, Leadership Academies, etc.
- Community businesses and institutions (e.g., banks, corporations, churches, etc.)
- Maryland Nonprofits Associations
 - <https://www.marylandnonprofits.org/>



Facts

Volunteers in Maryland

- 23.7% of Maryland population volunteering (2021)
- \$34.70 value per volunteer hour (2024)
- 181.9 million hours of volunteer service per year (2024)

Recruitment and Vetting

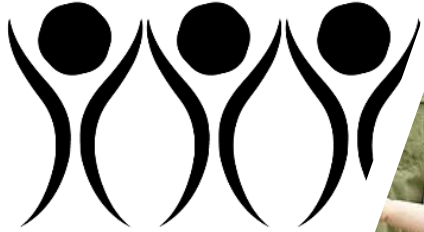
- **Vetting**

- Board Recruitment and Appointment Plan
 - New Membership Profile Determination
 - Skills or expertise needed
 - Diversity considerations
 - Recruitment Needs and Strategies
 - Specific strategies based on the above
 - Formal Interview Template
 - General interview directions
 - 8-10 Questions
 - How long have you lived in the county and what brought you to the county?
 - What do you see as the pressing social needs of this county?
 - ...

More Interview Questions

- What has led to your interest in serving on this Advisory Board?
- Are there any state or local social service issues that you have an active interest in advocating for as a community member?
- Please describe your specific areas of expertise and talent, and how these could relate to your contributions as a member of the Social Services Board.
- Share with us any personal characteristics that would enhance this Advisory Board and relevant County Department of Social Services.
- One of the roles of a Board member is to be an advocate for the agency. Are you comfortable with that role and how would you go about doing so?

MASSE



**Maryland Association
Social Services Boards
Foundation**



For more information and questions
contact:
massbftrustee@gmail.com



Source: Board Excellence Governance Handbook (Maryland Nonprofits)