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SMACNA ANNUAL CONVENTION

Maui, Hawaii

OCTOBER 26-29

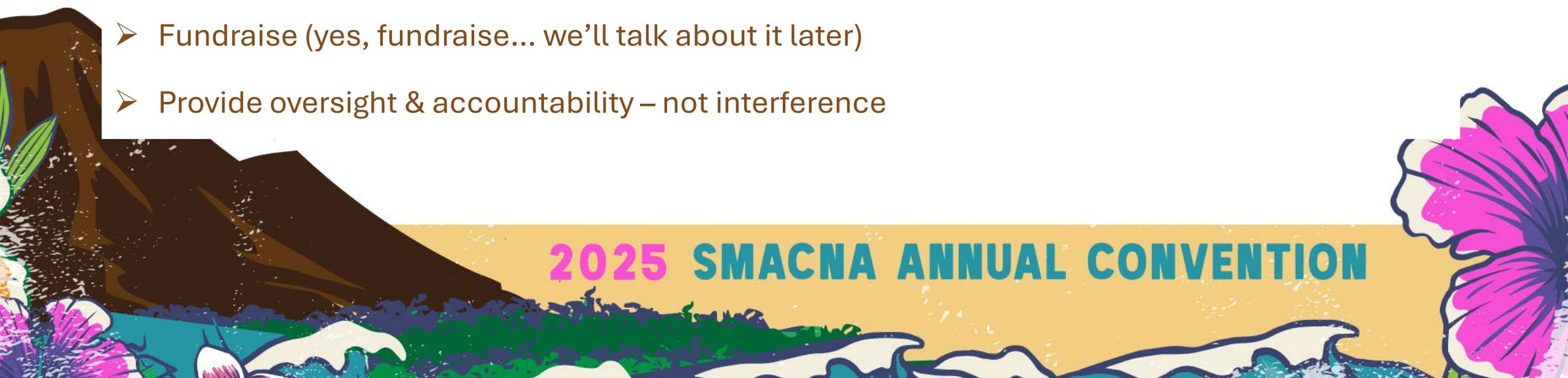


Maximizing Your Impact: Strategies for Effective Board Service

- Why does this matter and
- Who needs to hear it?

Why Boards Matter

- Set strategic direction
- Hire & support the CEO (chapter exec, executive director)
- Approve budget & monitor finances
- Ensure legal & ethical compliance
- Fundraise (yes, fundraise... we'll talk about it later)
- Provide oversight & accountability – not interference



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The Board That Gets it Right

The High-Functioning Board:

- Creates stability
- Drives Vision
- Asks the hard questions
- Helps raise resources
- Supports Leadership
- Holds the mission sacred

- And a note or two about the Board that gets it not-quite-right because the onboarding process isn't great, or maybe doesn't even exist.

Choosing the Right Board for You

➤ **First, know your “why”**

- Why do I want to serve on a board right now?
- What kind of impact do I want to have?
- What kind of people do I want to work with?
- How much time can I realistically give?
- What am I hoping to learn, do or build?

➤ **Match your skills to their needs**

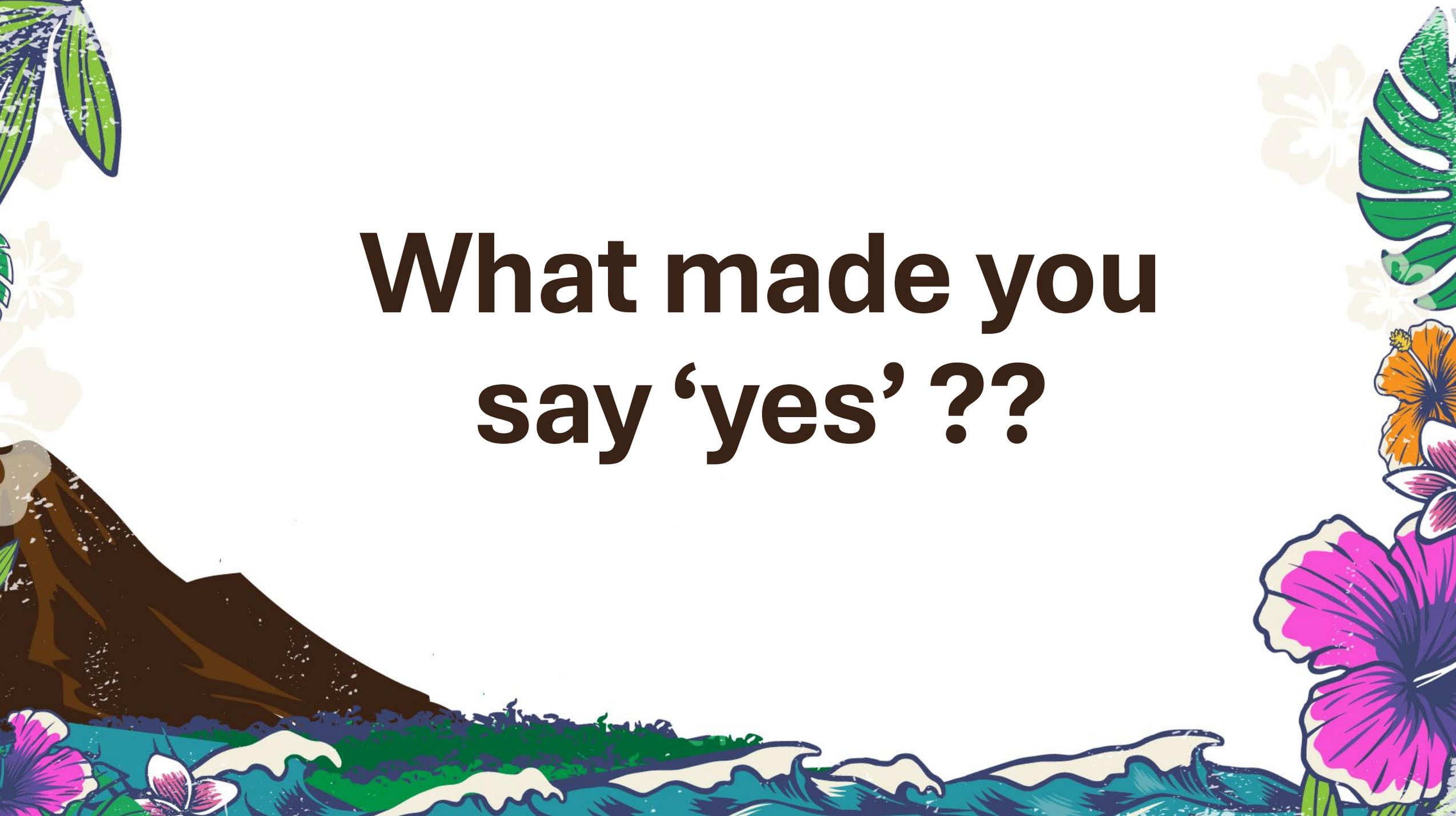
- Look at your strengths

➤ **Vet the organization like you’re dating it**

➤ **Red flags to watch for**

➤ **Say no when it’s not a fit**

➤ **And when you say yes... mean it.**

A vibrant tropical illustration. In the top left, there are green palm fronds. In the top right, there are green monstera leaves and a white hibiscus flower. The bottom left features a brown volcano with a grey crater, and the bottom right shows a large pink hibiscus flower. The bottom center depicts blue waves crashing onto a sandy beach. The text is centered in the white background.

**What made you
say 'yes' ??**

The 3 Hats of Fiduciary Responsibility

- Duty of Care
- Duty of Loyalty
- Duty of Obedience

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How to be a Productive Board Member

- Come prepared
- Ask good questions
- Stay in your lane (but use your blinkers)
- Follow Through
- Champion the organization outside of the room
- Leave room for others
- Know when & how to speak

Board Bravery Moment



Hosting Impactful Board Meetings

Start with a strong agenda & respect the clock



Ditch the staff reports (mostly) & spend that time focused on strategy rather than tactics



Create space for dialog, not dominance &

CLOSE WITH ACTION!

A decorative border surrounds the slide, featuring various tropical elements. On the left, there are green leaves and a brown, textured shape. On the right, there are green monstera leaves, a yellow hibiscus, and a pink hibiscus. At the bottom, there are blue and green waves and pink hibiscus flowers.

Working With the CEO (without accidentally micromanaging them)

- Understand your role.
- You set the vision. They execute it.
- Communicate clearly, and kindly
- The CEO is human
- Hold them accountable – with respect
- Support without hovering

**Your job isn't to make every decision.
It's to make sure the right person is making them.
And when that's in place, get out of their way and let them shine.**

Do

- ✓ Offer your expertise when asked
- ✓ Ask how you can help outside of meetings
- ✓ Give feedback privately & respectfully
- ✓ Trust the professionals to do their job

Don't

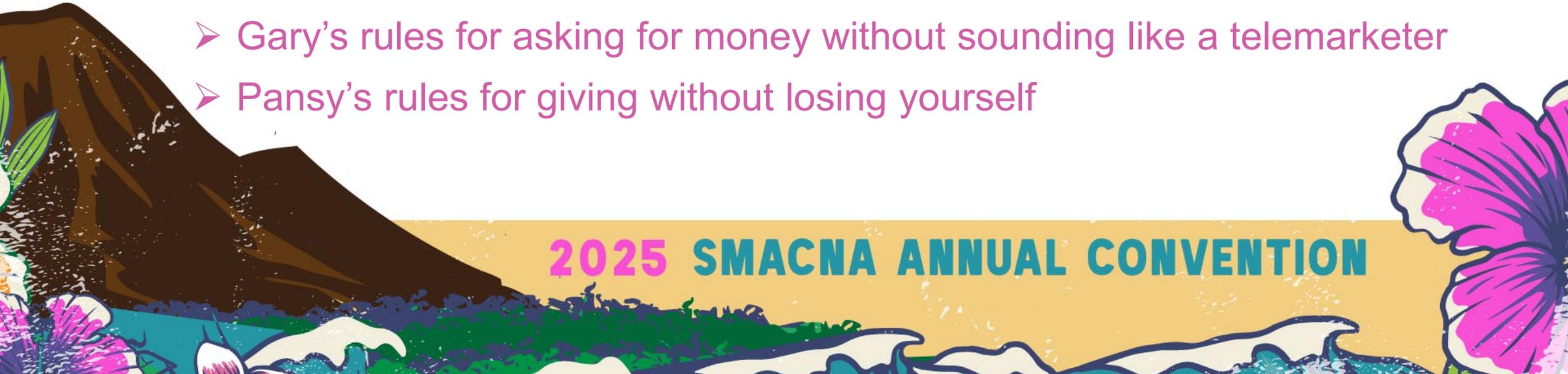
- ✓ Drop in with unsolicited edits to staff work
- ✓ Assume your advice = an action item
- ✓ Undermine leadership in front of others
- ✓ Use your title to override staff decisions

The “F” Word

(fundraising)

- What is actually expected of you
- Common fundraising misconceptions
- How you can contribute without doing it at all
- Shift your mindset – you’re offering an opportunity, not a burden
- Gary’s rules for asking for money without sounding like a telemarketer
- Pansy’s rules for giving without losing yourself

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Minding the Mission & the Money

- Treat the organization's budget like it matters—because it does.
- Suggest ideas and programs with realistic cost expectations.
- Enjoy quality experiences, but skip extravagance that doesn't serve the mission.
- Don't do anything you'd be embarrassed to explain to the auditor.
- Be mindful of staff time, event attrition, and volunteer resources—those are budget items, too.
- Your board seat is not a backstage pass—lead with humility, not entitlement.

Pansy's Rules of Order

(how to lead with grace when someone else uh...isn't)

Ask, don't accuse

"Can you help me understand how this expense supports our strategic goals?"

If someone wants attention,

don't feed the performance

"I appreciate the passion, but I'd love to hear from others on this too."

Model the behavior you want to see

Quiet credibility has more staying power than showmanship ever will.

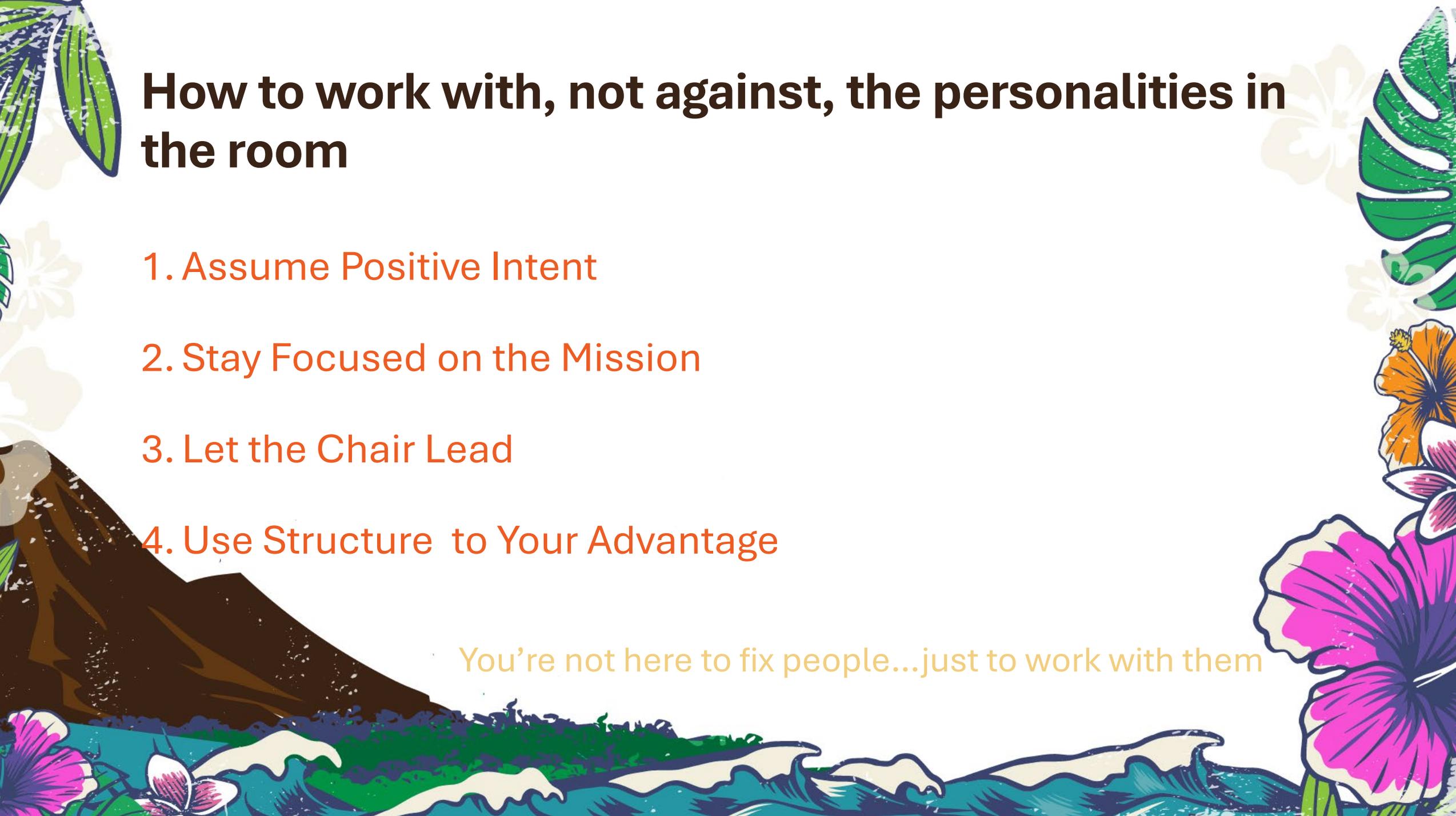
...and when it gets serious, take it offline



Board Personalities & Dynamics

Every Board is a mix of people. That's the beauty – and the chaos – of it.

- The Rambler
- The Gatekeeper
- The Ghost
- The Elephant
- The Resume-Padder
- The Bulldozer
- The Mirror



How to work with, not against, the personalities in the room

1. Assume Positive Intent
2. Stay Focused on the Mission
3. Let the Chair Lead
4. Use Structure to Your Advantage

You're not here to fix people...just to work with them



How to Lead (when someone is sucking the air out of the room)

When your Board meeting feels more like a hostage situation with pastries... Don't lose your cool, or your credibility.

1. Remember Why You're There
2. Redirect With Respect
3. Don't Join the Performance
4. Support the Chair (quietly)
5. Take the Long View

Have you ever had to reel in a rambler, silence a bulldozer or encourage the quiet one?

How did you handle it?

Would you do anything differently next time?



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Term limits, succession planning and Leaving Well

1. Good board service includes knowing when to say goodbye.
2. Why term limits matter
3. How to leave well
 - Give notice with time to plan
 - Offer support, not control
 - Champion the next leader
 - Stay involved – from a distance
4. Succession is not just a task – it 's a culture



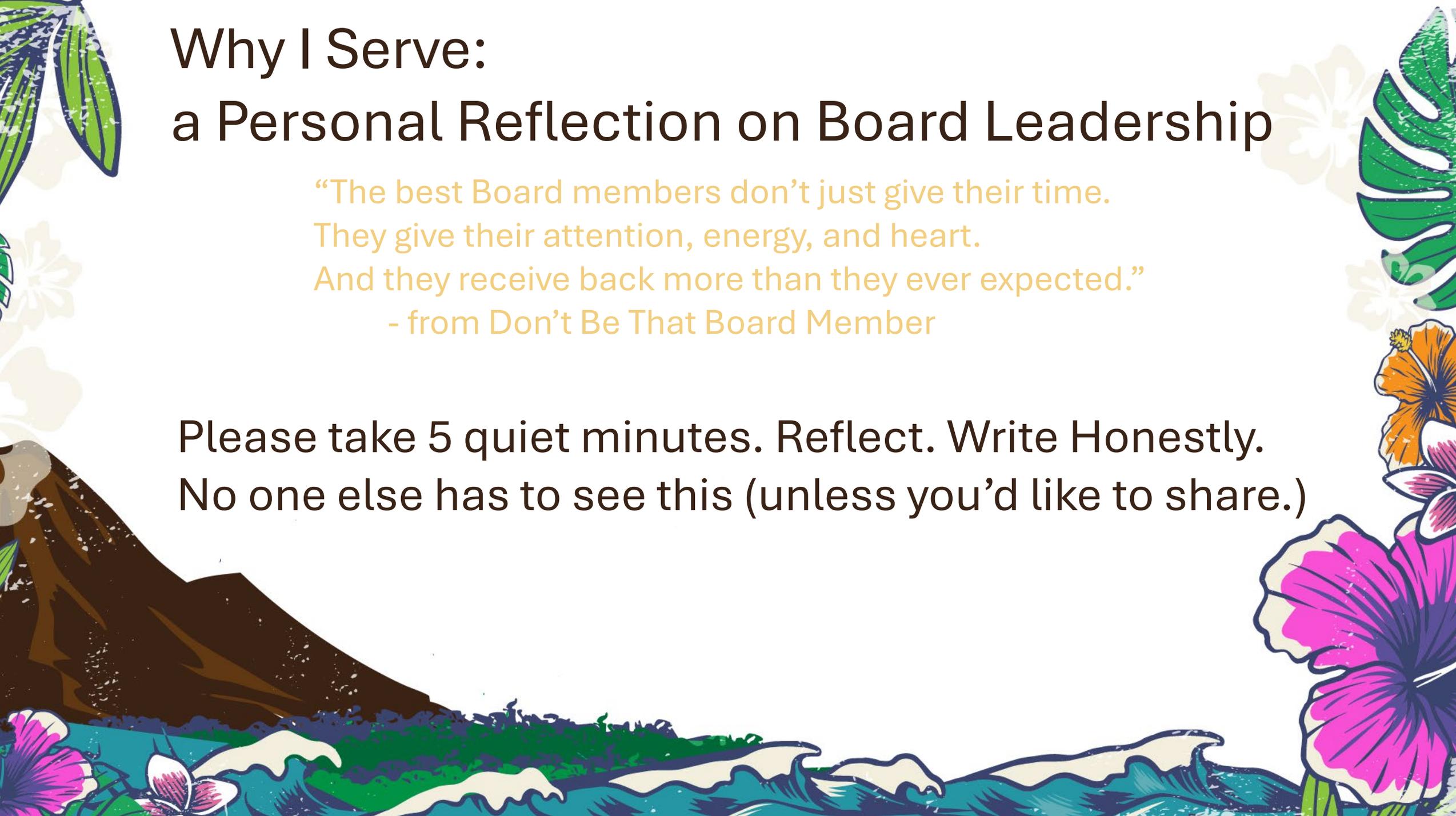
Fill Your Cup

When you commit to board service, you gain:

Perspective – on issues, communities, and challenges beyond your day-to-day.

Connection – to fellow board members who are smart, passionate, and often hilarious in surprising ways.

Growth – in leadership, in emotional intelligence, in your ability to sit through a motion to table a motion and still stay kind

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Why I Serve: a Personal Reflection on Board Leadership

“The best Board members don’t just give their time.
They give their attention, energy, and heart.
And they receive back more than they ever expected.”
- from Don’t Be That Board Member

Please take 5 quiet minutes. Reflect. Write Honestly.
No one else has to see this (unless you’d like to share.)

The Exit Interview

If you can say “yes” to these, you’re doing it right.

- I understand the mission and I care about it.
- I read the materials before the meeting.
- I listen more than I speak, and I speak with purpose.
- I support the CEO without micromanaging them.
- I follow through on what I commit to.
- I give financially in a way that’s meaningful to me.
- I help open doors for fundraising, connections or talent.
- I ask strategic questions and avoid personal agendas.
- I help make room for other voices, not just my own.
- I represent the organization with integrity – inside and out.
- I know that stepping back can be just as powerful as stepping up.



Using a few words, what will you leave this presentation inspired to bring to your Board service?

Please take a moment to complete the session survey found on the convention app.



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