

## **Presenting to the Beth Am Board of Directors: Hints for Success**

### Overarching considerations

- Understand how much time you have and plan accordingly.
- It can be helpful to provide a brief document to review in advance, especially if you wish to share detailed financial information, or are requesting formal approval of a motion
- PowerPoint can be helpful, but isn't required. If you will need a projector, let us know.
- Usually, we discuss as we go along.
- We are always happy to hear from you!
- You are welcome to attend and participate in the entire Board meeting (with the exception of when the board meets in executive sessions).

### Framework for presentation

- Introduction: who you are, what group do you represent, a little bit about the group
- State your objective: why are you speaking to the Board? Four possibilities:
  - o Update regarding ongoing work: you want the Board to be informed. Can be a good approach for standing committees or long-term projects launched previously
  - o Input and support: you want to hear the Board's opinion and thoughts
    - What are you recommending?
    - What specific questions do you want input on?
  - o Funding: you need financial resources
    - Amount (should be over \$500 and not already budgeted)
  - o Formal approval: you want a resolution
    - For any motions, provide draft language
    - Is formal Board approval required? Check by-laws if uncertain (on website)
- Share relevant data. This could include:
  - o Timeline: original plan, what's been accomplished, where are we now, what is planned for the future. On schedule?
  - o Congregants impacted: how many? What demographics?
  - o Financial implications
  - o Staff implications
  - o Benchmark data: what are others doing? What do thought-leaders say?
  - o Trend data: how has this been changing over time?
- If you are proposing an action
  - o What other alternatives did you consider?
  - o What supports the alternative you are recommending?
- Looking ahead
  - o What is your next action or key milestone, if any?
  - o What are the long-term implications or risks?
- Formal request for approval or funding, if relevant
  - o Restate the recommendation you had introduced at the beginning
- Summarize key points, any changes to the recommendation arising out of discussion, and any follow-up agreed to.

**THANK YOU!**