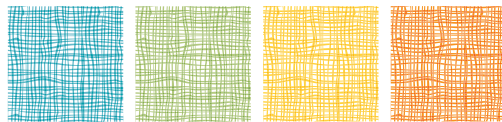


Threads of TRANSFORMATION



STORIES & TOOLS OF NONPROFIT BOARD EMPOWERMENT

Collected from the Board Empowerment Program Pilot Cohort



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Threads of **TRANSFORMATION**

Stories & Tools of Nonprofit Board Empowerment

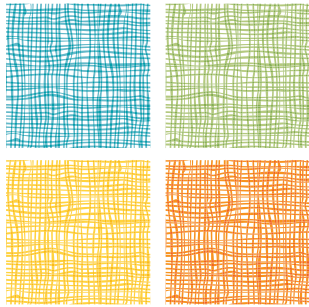
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List of Participating Nonprofits

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Threads of **TRANSFORMATION**


Stories & Tools of Nonprofit Board Empowerment

Introduction

Strong board leadership is one of the most powerful levers nonprofits have for sustaining impact, deepening trust and moving missions forward. To enhance this work for organizations in Monterey County communities, the **Center for Nonprofit Excellence (CNE)** of the **Community Foundation for Monterey County (CFMC)** created the **Board Empowerment Program (BEP)**. The initiative invests directly in board leadership, structure and relationship-building.

Beginning in February 2025, the BEP provided 12 nonprofits with a \$5,000 unrestricted grant plus nine months of focused coaching with Pure Momentum Consulting, customized tools and cohort connections. (See Appendix for list of 2025 participants.) Whether they faced leadership turnover, building a board from scratch or stepping into new growth for example, each nonprofit defined its own goals and used this container to take meaningful action throughout the program.

How to Use this Resource

This report summarizes the pilot Board Empowerment Program experience. It is also a living resource shaped by the voices, stories, tools and insights of the 12 diverse organizations that participated in the inaugural BEP cohort. Its practical tools (shared as links ) and honest reflections are helpful for:

- **Nonprofit leaders** wondering how to bring clarity, structure or new energy to their own boards
- **Board Presidents and Executive Directors** navigating succession, fundraising or growing pains
- **Teams** preparing to join a future BEP cohort or any Monterey County nonprofit looking to move from board maintenance to meaningful stewardship

Each theme includes stories from participants, highlighted tools and shared lessons woven together for both encouragement and clarity. They can be shared with nonprofit teams, printed for board meetings or to inspire further reflection.



Rebuilding Board Structures

“Don’t wait for burnout to define your roles—do it before things break down.”

Many nonprofit leaders began the Board Empowerment Program carrying boards that were deeply mission-aligned but stretched thin, uncertain of their roles or operating with habits formed out of necessity rather than design. Some were navigating rapid growth while others were rebuilding after founder transitions. A few were putting formal governance systems in place for the first time. There was a desire for structure and sustainability. One of the most widely used and immediately impactful tools to support these organizations was the [Board Officer & Committee Chair Job Descriptions](#), which gave language and structure to changes boards had long felt but hadn’t yet named.

Spotlight

AI & Friends - Defining Roles That Last

AI & Friends is a grassroots food justice organization that operates with one staff member and over 40 active volunteers. Its board of six members, though passionate and committed, had limited prior experience with formal governance systems and no clear division of roles. Like many community-founded efforts, leadership was held by those closest to the work, often without clear job descriptions, term tracking or succession plans.

Board Secretary Justin described trying to facilitate meetings while also capturing minutes, holding expectations and keeping everything moving. “Clarifying board roles kinda saved me from burnout,” he reflected.

Through the BEP, the team embraced tools like the [Board Officer & Committee Chair Job Descriptions](#), Robert’s Rules of Order Cheat Sheet and Board Commitment Forms. Implementing these created immediate scaffolding for more efficient meetings, clearer accountability and a new sense of empowerment.

“We’re in our harvest season now...reaping what we’ve sown over the years. We’re becoming independent and resilient.”

– Justin, AI & Friends Board Officer

It also laid the groundwork for activating an Advisory Board and preparing for eventual ED transition toward a board that could not only support the mission but carry it forward.



Board Officer & Committee Chair Job Descriptions



This tool can help if your board roles feel fuzzy, reactive or built on tradition rather than clarity. Revisiting officer and committee chair roles can support alignment, reduce burnout and strengthen succession planning.



[Download the Board Officer & Committee Chair Board Job Descriptions](#)

Clarifying Board–Executive Director Relationships

“You can’t carry a healthy board relationship in your head alone.”

Knowing that the relationship between a board and Executive Director (ED) is foundational, BEP was designed for both ED and Board Chair to participate as a team. For some nonprofits in the cohort, clarifying

board–ED roles was urgent. EDs were holding too much. Board members weren’t always sure how to help. And everyone was tired of pretending that “pitching in” was the same thing as governing well.

A resource that shifted things most for BEP participants was the [ED–Board Report Template](#).

This simple, repeatable tool helped EDs speak clearly to their board about what mattered most: progress on goals, strategic concerns and where support was needed. Rather than relying on informal updates or last-minute agendas, the report offered structure, accountability and mutual understanding. When paired with honest conversations and visual frameworks like the Governance vs. Operations Guide, this resource gave teams a tangible way to work together without requiring more meetings or bandwidth. It helped some groups shift from blurred boundaries and silent overload to shared clarity, healthier collaboration and leadership structures that could actually breathe.



ITN Monterey County - From Holding Too Much to Sharing the Load

ITN Monterey County provides low-cost, door-through-door transportation to seniors and people with visual impairments. The agency is small but highly active—managing logistics, scheduling, fundraising and outreach on a daily basis. The board consisted of eight members, many of whom were eager to help but unclear on how to contribute meaningfully without stepping into operations.

“We started to actually see our board as a strategic body again, not just another to-do list for the ED.”

– Aimee, ITN Monterey County Board President

Executive Director Jessica was managing nearly everything: strategy, supervision, program execution and board relations. Board President Aimee reflected, “Jessica is amazing and she’s so

accomplished. But without clearer role alignment across the whole team, it made all of our positions feel less defined, even at the board level.”

Through the BEP, ITN clarified roles across both staff and board, used a Governance vs. Operations guide to reshape internal workflows and implemented a new [ED–Board Report Template](#) that became a monthly touchpoint. The format allowed Jessica to highlight goals, note emerging needs and request board support in ways that were actionable and appropriately scaled. This small shift freed up executive capacity, highlighted staffing issues that needed adjustment and gave the board a renewed sense of purpose. “We’re figuring out the tangible things we need to consider so we can actually accomplish our strategic goals in a practical way,” added Jessica, ITN Monterey County ED.

ED–Board Report



The ED–Board Report Template supports clear, strategic communication between meetings and builds a rhythm of shared leadership that doesn’t rely on heroic effort.



[Download the ED–Board Report Template](#)



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Preparing for Board Recruitment

“ Pipeline work isn't just about adding people. It's about preparing your culture to receive them.”

Many agencies in the BEP cohort faced real challenges: small boards with big responsibilities, term limits without successors, gaps in regional or cultural representation and recruiting efforts that felt more reactive than strategic. Without a culture that's ready to receive someone new, especially someone younger or from a different background, that person may never fully engage. Several BEP agencies took steps to ensure the board itself was prepared before recruitment began. One of the most powerful resources was the [Youth-Centered Onboarding Conversation Guides](#), which helped agencies not only welcome young board members but also create conditions for shared learning, trust-building and retention. Paired with recruitment packets, succession templates and culture reflection tools, this resource gave boards practical, relational ways to integrate new voices and shift culture from within.

Spotlight

Epicenter of Monterey - Relationships at the Center

The Epicenter of Monterey is a youth-centered agency with 14 staff and six volunteers serving young people and families throughout Monterey County. Its board of seven included four first-time members; and its new Executive Director had stepped into leadership just two years prior. With a small but committed team, the organization was ready to build a board that reflected its mission not just in name, but in lived experience and perspective.

During the BEP, Epicenter's team focused on expanding the board, onboarding new officers and preparing to welcome a youth member intentionally and relationally.

The team used the [Youth-Centered Onboarding Conversation Guides](#) to shape mentorship roles and prepare adult board members to build relationships with youth. Rather than rushing into recruitment, they slowed down to build a foundation

of psychological safety, accountability and intergenerational trust.

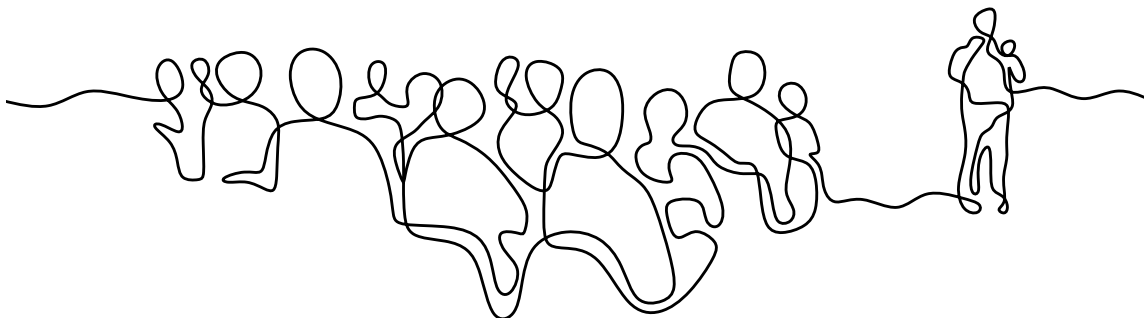
“ We brought everything from our coaching meetings [with the BEP consultant] and cohort convenings back to our board. We wanted our members to learn what it means to govern here, not just serve anywhere.”

– Richelle, Epicenter of Monterey

“We don't expect each other to be perfect. We stepped into roles because we believe in the mission, and we're building this together.”

– Fernanda, Epicenter of Monterey Board President

“This helped me reclaim my voice. I gained more confidence—not just in what I'm doing, but in what we're building.” – Richelle, Epicenter of Monterey ED



Youth-Centered Onboarding: Conversation Guides for Welcoming Young Board Members



This onboarding guide is a critical bridge if your board is preparing to welcome youth, emerging leaders or anyone who has traditionally been excluded from decision-making. It's also a culture-check, a conversation starter and a pathway to more inclusive, sustainable board leadership.



[Download the Youth-Centered Onboarding Conversation Guides](#)



Guidance for a Hesitant Board

“Start. Even if you’re messy. Especially if you’re messy.”

“Don’t wait for a crisis to work on your culture.”

“This isn’t about being perfect—it’s about showing up with intention.”

“You think your board isn’t ready. But they’re more ready than you think.”

“Ask for help. It’s not a sign of weakness—it’s how you protect your mission.”

“Everything you’re facing? You’re not alone. Others have faced it too.”

Biggest Surprises

One conversation
could shift years of
confusion

We’re not the only
ones trying to figure
this out

Clarity brings courage—
and with it,
forward movement

“Governance” can be
human, warm and still
get things done

Formalizing roles
doesn’t limit people—
it frees them

Emotional safety
matters as much
as strategy



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Culture in the Board Room

“Make space for people to be human and governance will follow.”

Many BEP nonprofits worked on sustainability, inclusion and shared board leadership. Board culture emerged as a quiet but consistent thread in the form of real-time questions like:

How do we onboard people without losing our rhythm? What kind of energy do we carry into our meetings? How do we disagree with care? How do we stay human while still getting things done?

One helpful resource was the [Supporting Board Meeting Flow with Care & Collaboration tool](#). Originally adapted from a simplified “Culture of Care” framework, it offered a way to name norms, humanize pacing and facilitate board meetings that were both efficient and emotionally grounded. The tool includes customizable meeting elements like check-ins, shared intentions and role pairings.



NAMI Monterey County - Supporting Meetings with Care and Collaboration

NAMI Monterey County is a mental health nonprofit with four staff members, 30 volunteers and a dedicated board of eight. In recent years, the organization experienced both board turnover and a rise in community need, prompting a shift from a hands-on working board to one capable of holding structure, sustainability and shared leadership.

Executive Director Colleen and Board President Joe were deeply committed to the mission, but board meetings had become either rushed or overloaded with little room for clarity or connection. They longed for a meeting structure that felt grounded in relationships, not just reports. Using the [Supporting Board Meeting Flow with Care & Collaboration tool](#), expectations were named gently but clearly,

supporting members to show up with both care and capacity.

“We could finally pause, take a breath and just do the next right thing. That’s what allowed us to grow.”

– Colleen, NAMI Monterey County ED

“It can be difficult to keep board members,” Joe reflected, “so the relationship is so important.”

With these foundations in place, the board turned toward growth. Their goal wasn’t just recruitment. It was culture-building. This shift didn’t just make meetings smoother, it made them more sustainable. And it laid the groundwork for a new kind of leadership: one that was clear, calm and collaborative from the start.

Supporting Board Meeting Flow with Care & Collaboration



If your board meetings feel rushed, disconnected or draining—this tool can help. It doesn’t add more to the agenda. It helps your meetings become the kind of space where shared leadership can actually happen.



[Download the Supporting Board Meeting Flow with Care & Collaboration Tool](#)

Strategic Alignment

“Even a simple roadmap can shift a board from watching to working.”

As agencies clarified their vision for the future, one question kept arising: how do we make sure the board can actually carry it forward? Even the strongest [strategic] plan falters if board members don't see their role in the plan or feel prepared, connected and equipped to act.

Using the [Sample Onboarding Plan for New Board Members](#) marked a turning point for several groups. Rather than a one-time orientation, the tool offered a six-month rhythm of integration blending strategic grounding, relationship-building and role clarity. Boards used it to welcome new members, prepare incoming officers and ensure that strategy lived in practice, not just on paper.



Spotlight

Wonder Wood Ranch - Bringing the Board into the Plan

Wonder Wood Ranch is a youth-focused nonprofit serving vulnerable communities with a team of four staff and nearly 50 volunteers. Its board was restructured at the end of 2024, with nine members, a recently elected president and few formal governance systems in place. The need was clear but the path was uncertain.

With the help of the [Sample Onboarding Plan](#), job description templates and strategic meeting structures, the board began building shared ownership from the ground up. It clarified officer roles, developed a commitment form and created a recruitment packet to ensure incoming members were aligned from the start. At Wonder Wood Ranch, board-ED check-ins created space for aligned action. And

cohort conversations sparked ideas that turned into immediate next steps.

“Now we know what we didn't know—and we've made significant steps in just nine months.” - Michele, Wonder Wood Ranch Board President

“The conversations helped us be more specific, to dig deeper and achieve next steps.”

– Rick, Wonder Wood Ranch Board Officer

“My board has become true partners. They're stepping into things they may not feel fully equipped for—but they're willing to try. [BEP] poised us in the best position for the actual service of our mission.” - Marlo, Wonder Wood Ranch ED

Sample Onboarding Plan for New Board Members



If your board has new members, shifting leadership or strategic plans that feel disconnected from governance, this onboarding plan can help you realign. It offers a way to ground every board member in purpose, pacing and shared direction.



[Download the Sample Onboarding Plan for New Board Members](#)



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Succession Planning

“A plan is helpful. But being seen, supported and ready to release—that’s what makes the transition real.”

Succession means protecting the nonprofit mission beyond any one person’s tenure. For founder-led and all-volunteer organizations, this is especially tender. The lines between personal identity, organizational memory and visionary leadership are often blurred. But when knowledge isn’t shared or structures aren’t in place, even the most passionate missions can unravel in transition.

For several agencies considering succession, the [Succession Transition Framework for Founder-Led, All-Volunteer Boards](#) became a cornerstone for both practical and emotional preparation. The tool encouraged honest dialogue, gradual delegation and rituals of release, especially for those stepping down from founding roles.

Other tools supported this evolution: monthly board capacity check-ins helped assess what leaders could realistically carry; SOPs (Standard Operating Procedures) and committee charters clarified who does what; bylaw revisions ensured transitions were legally sound; and individualized coaching sessions gave space to reflect and recalibrate.



Spotlight

Birth Network of Monterey County - Releasing Leadership, Reweaving Stewardship

For Birth Network of Monterey County, succession wasn’t theoretical—it was happening. With a board of 13 working parents, birth professionals and advocates, the all-volunteer organization had long relied on its founder, Gail, to carry both strategic and operational leadership. Birth Network started BEP anticipating Gail’s transition in 2026, and it focused on preparing the board and Gail for what would come next.

With support from the [Succession Transition Framework](#), Gail initiated a formal leadership transition plan. She worked with the board to clarify officer roles, revise bylaws and build

SOPs for continuity. They introduced a monthly capacity check-in, began a recruitment pipeline and laid out a structured timeline to support leadership handoff.

Now, with the groundwork laid, Gail and her board are planning a retreat that will anchor the next phase of leadership—and continue growing the mission with shared clarity and care.

“It’s one thing to write a succession plan,” she said. “It’s another to feel safe stepping back.”

– Gail, Birth Network of Monterey County
Board President

Succession Transition Framework for Founder-Led, All-Volunteer Boards



If your organization is preparing for leadership transition—especially in a founder-led or volunteer-run setting—this framework can help. It blends structure with reflection and offers a way to release leadership with clarity, dignity and trust.



[Download the Succession Transition Framework for Founder-Led, All-Volunteer Boards](#)

Words of Wisdom for Fellow Nonprofits

Nonprofits that participated in the BEP pilot cohort carved out time they didn't have, navigated imperfect dynamics and kept showing up. They showed commitment to learn, to lead with heart and to bring their boards along—not just for compliance, but for real, lasting impact.

If there's one thing this cohort would want you to know, it's that change is possible. And you don't have to do it alone. They offered these insights for any nonprofit leader wondering what might change when you truly invest in your board.

“

We simplified
the scary.
That's what
gave us
momentum.”

“

This showed us that
the board and ED are a
partnership—not just
parallel tracks.”

“

We finally
have structure
to match our
passion.”

“

Small steps
lead to big
impact.”



“

A plan is good.
But trust and clarity?
That's what really
moves the mission
forward.”



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Overall Themes

The path to empowered governance is not a straight line. Each of the diverse organizations in the 2025 pilot Board Empowerment Program followed a unique pathway through the resources of monthly coaching support, cohort convenings and responsive resources. Several patterns emerged as transformational shifts took place.



The Shift from Reactive to Intentional Governance

The most consistent theme was a move from reactive, personality-driven board habits to more strategic and intentional governance. This involved updating outdated bylaws, clarifying roles and embracing structures that aligned with the organization's current reality instead of just inherited routines. The transition was often messy and nonlinear, but the shared commitment to governance with integrity was clear.



Clarity and Care as the “Twin Engines” of Change

Change didn't come from pressure. It came from clarity paired with care. The most meaningful shifts happened when leaders named expectations gently, practiced care-centered accountability and used structure as a form of relief, not rigidity. Tools like the Board Culture of Care Framework, Meeting Flow Templates, and Conflict Resolution Guides helped bring this balance to life.



Right-Sized Strategy for Different Stages of Growth

Participating agencies spanned a wide range of sizes, board maturity and lifecycle stages. What worked best was “right-sized” strategy: small tools with big impact, modular templates and coaching that met agencies where they were. “Best practice” wasn't imposed but instead offered as a palette rather than a prescription.



Succession as the Quiet Urgency

Whether navigating founder transitions or prepping for officer rotation, succession was always in the room. Agencies used tools like the Succession Transition Framework and Officer Planning Templates to both outline next steps and normalize the emotional and strategic dimensions of letting go. The realization? Succession isn't a crisis. It's a culture.



Small Wins, Big Momentum

Progress didn't always look dramatic, but it was steady. A revised ED report. One new committee lead. A printed role chart in a meeting. These moments sparked momentum and reminded teams that governance doesn't require perfection. Just movement.

Reflections on Program Design

What Worked

During the BEP, participants weren't just trying out tools shared by the facilitator. They were co-creating the experience. Their iterative feedback shaped what the program became and offered insight into what future versions could hold. Participants consistently named the following as program highlights:

- **Goal-Setting** (two virtual sessions in February and March) anchored each agency's participation in a clear direction without demanding perfection. The goals honored each agency's capacity and culture.
- **Coaching Support** (monthly, virtual calls with ED and Board Chair) was described as "a lifeline," "a mirror," and "the thing that kept us going." This relationship with the consultant allowed for context and trust.
- **Tools and Templates** translated complex ideas into tangible next steps—many used immediately.
- **Flexibility** allowed agencies to move at a pace that fit their reality. "This met us where we were," one ED shared.

The mix of structure and spaciousness was important for development to happen. Several participants named that, for the first time, they didn't feel like they were "behind" or failing. Instead, they felt met—and in that meeting, real change could take root.

Opportunities to Evolve Program Design

Participants offered thoughtful ideas to help future BEP cohorts go even further.

- **More Room to Connect** Agencies appreciated the cohort convenings (three in-person) but wanted more time to go deeper. Suggestions included extending sessions, adding breakouts or creating small peer pods.
- **Acknowledging Boards at Different Stages** With boards ranging from newly formed to well-established, participants asked for optional tracks or examples based on board maturity.
- **Fine-Tuning Convening Flow** Participants appreciated the session authenticity and suggested:
 - More time to reflect and synthesize as a group
 - Integrate CFMC resources more explicitly
 - Create space to share additional training or opportunities

Insights for Funders and Capacity Builders

The cohort experience can offer a window into what it takes to sustain organizations. When asked what they wished funders and partners better understood, agencies shared candid reflections:

- “ Funders want to fund programs, but so much of the mission lives in leadership.”
- “ We need more support for the admin side—because that's what makes the programs work.”
- “ All-volunteer boards come with unique challenges. We need space and support to grow, too.”
- “ There's power in unrestricted funds—and in funders staying close as partners, not just evaluators.”



Reflections from the BEP Facilitator

What I witnessed through this pilot was not just board training—it was sacred repair. A reweaving of trust, structure, and possibility inside organizations that have long carried more than their share.

These agencies didn't need fixing. They needed witnessing, resourcing and a clear path forward that honored their unique stage, culture and calling.

This work could not have happened without the partnership of the Community Foundation for Monterey County. CFMC didn't just fund a program. It co-created a space where real transformation could occur. Their willingness to listen, adapt and invest relationally became a model for how capacity building can be done with heart and strategy, together.

To the nonprofit leaders reading this:

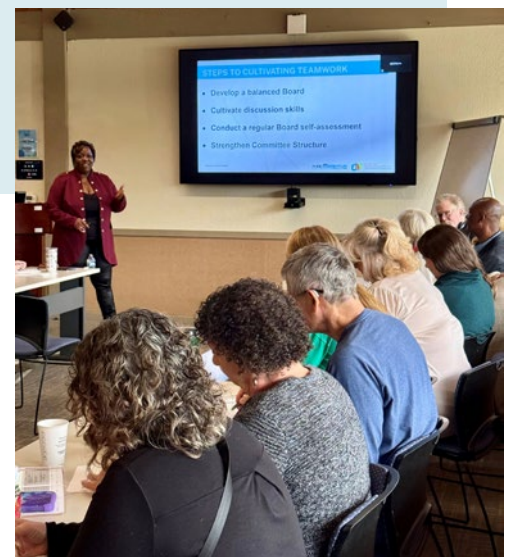
- You are not behind. You are not alone.
- There is a path forward and it doesn't require perfection, just willingness.
- This program was designed as a beginning. Not a formula, but a framework.
- Not a prescription, but a portal into what becomes possible when nonprofit leaders are seen, supported, and invited to build from the inside out.

Thank you to CFMC for seeing the need and meeting it.

And thank you to the agencies who said yes. You have created a ripple that will carry far beyond this cohort.

To learn more about my work and approach, visit puremomentumconsulting.com, where the pattern continues to unfold.

Dr. Lydia Hughes-Evans
Facilitator, CFMC Board Empowerment Program 2025



Appendix

Special Thanks

The Board Empowerment Program pilot received funding from the David and Lucile Packard Foundation.

Board Empowerment 2025 Cohort Nonprofit Participants

AI & Friends

Birth Network of Monterey County

Boys & Girls Clubs of Monterey County

Epicenter of Monterey

Everyone's Harvest

Foundation for Monterey County Free Libraries

Gathering for Women-Monterey

Independent Transportation Network Monterey County

NAMI Monterey County

Partnership for Children

Veterans Transition Center

Wonder Wood Ranch



(l to r) Susie Polnazsek, Director, Center for Nonprofit Excellence; Dr. Lydia Hughes-Evans, facilitator; Reid Norris, Program Manager, Center for Nonprofit Excellence

Links to Board Resources, Tools and Templates

- [Board Officer & Committee Chair Job Descriptions](#)
- [ED Board Report Template](#)
- [Youth-Centered Onboarding: Conversation Guides for Welcoming Young Board Members \(Under 25\)](#) With a companion set of relationship-building questions for Board Mentors
- [Supporting Board Meeting Flow with Care & Collaboration](#)
- [Sample Onboarding Plan for New Board Members](#)
- [Succession Transition Framework for Founder-Led, All-Volunteer Boards & Agencies](#)



The Center for Nonprofit Excellence is a program of the Community Foundation for Monterey County



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