

## Board Memberships

# 3 Things to Ask Yourself Before Joining a Board



By: **Robert C. Smith**  
Partner | Cleveland

One of the best things you can do for your community and your career is to participate in civic engagement. This is a commitment that goes beyond philanthropic contributions and even dropping change in the Salvation Army bucket each Christmas. Of course, giving is important, no matter how it is manifested.

But civic engagement is not just about periodic transactions every holiday or quarter. Instead, it is about playing a role in your community that can improve public policies, services and amenities for everyone, no matter who they are or where they came from.

One way to do this is by joining a board of directors, whether it's one that serves a local chamber of commerce, hospital, arts organization, or charity. The benefits are immeasurable.

### Benefits of Board Memberships:

- » **Connect you to your community on a deeper level.**  
They give you the ability to see the inner working of policymakers or principals who are involved in important issues, like homelessness or refugee assistance, that you have little or no exposure to in your professional life.
- » **Strengthen your professional credibility and visibility.**  
People can see you more than an attorney or investment professional but as someone who cares deeply about solving issues that impact the lives of others.
- » **Grow your network.**  
You'll engage with people in the field, across the board table, at community events, all of which are good for business.
- » **Sharpen your skills. Too often our clients fit a similar profile.**  
Through civic engagement, you'll encounter challenges that need solving. They will likely involve people and situations that are very different than what you deal with every day.

While the benefits represent the upside to board membership, it is important that, for everything to work, you need to give more than you receive. Board membership requires investment on a deeper level. Joining a board just for professional gains will not work for you or the organization you want to serve. The reason is because successful boards operate according to a calling for a higher good. You must share that above all else. If not, they won't want you, and being dismissed might tarnish your reputation.

I have long-time friend who is a talented and successful insurance sales leader. For several years he volunteered for an organization that I was the chairman of its board. He became frustrated because we had not invited him to join the board. One day he came to me and asked why. "It's clear to all of us, but not clear to you," I told him. "you've had a terrific career in sales, but boards like ours don't have tolerance for board members who use their board position to sell."

In other words, professional boards don't want members who are there for the wrong reasons: To use the organization's name and logo in their marketing materials, to sell their services, to approach every board event as a networking opportunity. They also don't want to feel that any member feels handcuffed to the table. If they suspect the person has intentions other than civic engagement, they often won't get the invitation to join. No one wants a board member who ends up missing meetings or doesn't reply to email threads because the experience is not what they anticipated when they first joined.

For all these reasons, it's important to be certain if board membership is for you before you join. You already know of the benefits. But like any relationship, a board seat requires tenacity and commitment.

## If you are considering joining a board, ask yourself:

1

Is this a mission I care about greatly?

Do you have a personal connection to the mission? Does the mission speak to a particular passion and motivate you to make a financial gift that you would feel good about? If so, you'll have a better time being engaged, coming up with new ideas, galvanizing your community around the mission, and serving as an advocate for the organization in your daily life.

2

Would I enjoy listening to and learning from the people around the board table?

Our roles change the moment we walk into the board room. We may be leaders in our professional lives, but on boards we need to be listeners first. Knowing how to defer to others, consider conflicting opinions, and being open to learning new perspectives are all essential to succeeding.

3

If this organization called an emergency meeting one afternoon, would I willingly rearrange my schedule to make it work?

If your answer is "no," you need to reconsider your plans to join a board. Ultimately a board of directors ensures the long-term viability of the enterprise. Some organizations rely heavily on their boards to help mitigate emergencies, great and small. Boards provide important direction and play an important role in guiding the organization's top principals. They will turn to you for advice and support. That means being available and engaged if needed.

Nominating committees should come to you. They tend to screen candidates that pursue a board position. The keys to success are to make sure the mission resonates and to determine if you willing to go above and beyond what is being asked. If you are, your community will start paying closer attention to your skills and talents and you'll see the value that making a difference can give to your career.

### About the Author:

Bob is a Partner in Cerity Partners' Cleveland office and the firm's Ohio Market Leader. He also serves on the firm's Leadership Team and Private Client Portfolio Committee. Bob has more than forty years of experience in investing, finance, accounting, and business management.

He received a Bachelor of Science in Business Administration (Accounting) degree from Ohio Northern University and holds a Masters of Business Administration (Finance) from Duquesne University. ONU has awarded him an Honorary Doctorate of Business Administration for his six years of service as Chair of the Board of Trustees as well as many other civic leadership roles.

Bob is deeply committed to civic engagement and has received numerous awards and recognition for his leadership. He was appointed to Chair the JobsOhio Board by Ohio Governor Mike DeWine as well as the Broadcast Media Commission. He has been inducted in the Ohio Foundation for Independent Colleges' Hall of Excellence as well as the Association of Ohio Commodores. He has served in leadership roles on numerous boards and investment committees of corporations and non-profit organizations including Encova Insurance, Ohio Northern University, University Hospitals of Cleveland, ideastream, the Greater Cleveland Partnership, Team NEO and Crime-stoppers. Several elected officials have also appointed him to boards of public entities, including the Ohio Public Employees Retirement System, the Ohio Bureau of Workers' Compensation, the Ohio Oil & Gas Commission, the Port of Cleveland and Tri C's Board of Visitors.



---

Cerity Partners LLC (“Cerity Partners”) is an SEC-registered investment adviser with offices in California, Colorado, Illinois, Massachusetts, Michigan, New York, Ohio and Texas. Registration of an Investment Advisor does not imply any level of skill or training. The foregoing is limited to general information about Cerity Partners’ services, which may not be suitable for everyone. You should not construe the information contained herein as personalized investment, tax, or legal advice. There is no guarantee that the views and opinions expressed in this brochure will come to pass. Before making any decision or taking any action that may affect your finances or your company’s finances, you should consult a qualified professional adviser. The information presented is subject to change without notice and is deemed reliable but is not guaranteed. For information pertaining to the registration status of Cerity Partners, please contact us or refer to the Investment Adviser Public Disclosure website ([www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov)). For additional information about Cerity Partners, including fees and services, send for our disclosure statement as set forth on Form CRS and ADV Part 2 using the contact information herein. Please read the disclosure statement carefully before you invest or send money.

©2022 Cerity Partners LLC, an SEC-registered investment adviser. All Rights Reserved.

14340031 (01/22)