

Effective Boards Series 2024

**Upholding
the Public Trust** Thursday, February 15
3 – 4:30 p.m.
Zoom

**What Does a
Treasurer Do?** Tuesday, February 27
9 a.m. – 12 p.m.
Geekdom

**So, You Want to be
President** Tuesday, March 26
9 a.m. – 12 p.m.
Geekdom

**Why Do We Need a
Secretary?** Tuesday, April 30
9 a.m. – 12 p.m.
LISC San Antonio

**Funders' Perspectives
on Effective Boards** Wednesday, May 15
9 – 10 a.m.
Zoom

**Representing Your
Organization** August
In-Person

**Recruiting & Orienting
Board Members** September
Zoom

**Fundraising for
Board Members** October
Zoom

**Board Member
Journey** November
In-Person

LISC SAN ANTONIO



LISC SAN ANTONIO

ABOUT

Local Initiatives Support Corporation

Together with residents and partners, LISC's 38 local offices help forge resilient and inclusive communities of opportunity across America.

MISSION

Working in community to build wealth, health and power

STRATEGY

Expanding local partners' capacity
Advocating for & leading systems change

VALUES

People are at the center of our work
We move at the speed of trust

VISION

A community in which residents are empowered to achieve their aspirations

AGENDA

Funders' Perspective on Effective Boards



I. Welcome and Introductions—Leilah Powell, LISC SA

II. Panelists

- Hala Farid
Executive Director, Texas Community Capital
- Barbara Ankamah Burford
VP Community Relations, Wells Fargo
- Juan Solis
VP Community Development Manager for Texas, Truist

III. Q&A

Effective Boards

Hala Farid, Executive Director



Background and Experience

- ❑ 32 years in community development and affordable housing, single and multi family
- ❑ Extensive residential mortgage background
- ❑ Experience in the non-profit, private and public sectors
- ❑ Served on numerous boards; currently the vice chair of Shelterforce and Grounded Solutions network, and a board member of Hogar Hispano, Inc., and Purple Heart Homes
- ❑ SVP/Director at Citi Community Development for nearly two decades
- ❑ Funded national non-profit housing advocates & groups
- ❑ Reestablished & leads the Texas CDFI Coalition

The Three W's

Effective Boards

- Regular meetings, minutes and agendas
- Term limits for officers and board members
- Bylaw reviews
- Strategic board recruitment & job descriptions
- Board training and retreats
- Committees and task forces
- Strategic planning and board giving
- Board diversity & inclusion

Board members

- Work
- Wisdom
- Wealth

Effective Boards

Barbara Ankamah Burford
VP, Community Relations



Background and Qualifications

Role

Vice President, Community Relations

Leads philanthropy, volunteerism, community relations initiatives and partnerships for the greater San Antonio Market, ensuring Wells Fargo supports impactful non-profit work in the areas of financial health, sustainability, small business growth and housing affordability.

Career and Expertise

Barbara has over 20+ years of experience administering programs and budgets that support small businesses, workforce initiatives, first-time homebuyers, affordable housing, and neighborhood engagement.

Workplace



Strengths Finders Themes

Maximizer
Individualization
Relator
Empathy

Boards Service

Democracy Prep K-8 (Board Chair)
Hemisfair Conservancy Board
Maestro Entrepreneur Center Advisory Board

Education/Training

Our Lady of the Lake University, Bachelor of Arts



Hobbies/Fun fact

Travel
Home Decor
Baking
Singing & Dancing w/
daughter

Effective and Engaged Boards are:

- Driven by the NPO's mission, vision and service to the community
- Instrumental in the success of the NPO
- Adhere to Bylaws
- Reflective of the community they serve- Diversity
- Thoroughly engaged and assessed for alignment with NPO

- All these factors can favorable influence funding



Warning Signs to Winning:

- Micromanaging Boards –Managing instead of governing
- Subset of Board Members are the only ones making the decisions and asking the questions
- Inconsistent decision making
- Address issues head-on with board members
- Utilize a board score-card which tracks board performance
- Onboarding and thoughtful engagement

