

## Description

The **CFTEA Board Leadership Launchpad Program (BLLP)** is a distinctive, **free-of-charge** professional development experience designed to prepare emerging leaders for meaningful board service and community impact. Through hands-on involvement, participants gain practical experience in nonprofit governance, including board responsibilities, financial oversight, and strategic decision-making.

This volunteer-based program provides a structured pathway for professionals to explore the inner workings of nonprofit organizations while developing essential leadership skills that directly support their career growth within financial institutions and beyond. Participants also benefit from unique networking opportunities with business and community leaders, enhancing their visibility and voice as part of the next generation of decision-makers.

For supporting organizations, the program offers a valuable way to invest in employee development, strengthen leadership pipelines, and foster civic engagement by positioning team members to represent their companies on nonprofit boards with confidence and professionalism.

Participants successfully completing this program will receive credit for the **Certificate in Non-Profit Leadership and Board Readiness**.

## Continue Your Nonprofit Leadership Journey

Graduates of the CFTEA Board Leadership Launchpad Program are already making an impact—but leadership doesn't stop here. Build on your momentum and deepen your expertise with continuing education with [CFTEA's Certificate in Non-Profit Management](#) and receive a **\$50 credit from CFTEA**. Courses included:

- Budgeting in a Nonprofit Organization
- How to Read a Nonprofit Financial Statement
- Leadership in a Nonprofit Organization
- Nonprofit Board and Volunteer Development
- Principles of Marketing for Nonprofit Organizations
- Strategy for Nonprofit Organizations
- Capital Campaigns
- Introduction to Grant Writing
- Introduction to Nonprofit Management
- Social Media for Nonprofits
- Fundraising for Nonprofit Organizations

Whether you're preparing for a long-term board role, exploring nonprofit executive pathways, or looking to bring more strategy and structure to your community involvement, advanced learning opportunities beyond CFTEA's Board Leadership Launchpad Program are available and can strengthen your skills in **governance, fundraising, financial oversight, and strategic planning**.

## Selection Process

The **CFTEA Board Leadership Launchpad Program** is open to motivated individuals aged 18 and older who are ready to make a meaningful impact through nonprofit board service. This 8-month experimental leadership journey begins with an upcoming program cohort. (February – September Annually) The information provided in this program offers selected participants a unique opportunity to gain hands-on experience in nonprofit governance.

Applicants are carefully reviewed by a selection committee composed of the CFTEA Executive Director and the Vice President of the Nominating and Personnel Committee. The top candidates will be invited to a virtual interview with the CFTEA Executive Director prior to final selection before selection.

Ideal candidates are **self-driven, dependable, and eager to grow as leaders**. A demonstrated interest in community or nonprofit involvement—such as a volunteer—is highly valued. Participants must be prepared to attend quarterly CFTEA board meetings via Zoom and participate in the annual in-person CFTEA Leaders Conference, with travel costs covered by the individual or their sponsoring organization.

This program provides a powerful development opportunity for participants while offering supporting organizations **a way to invest in their future leaders and elevate their community presence**.

## Duties and Responsibilities

As an accepted participant in the **CFTEA Board Leadership Launchpad Program**, you will take on meaningful responsibilities that will enhance your leadership skills and prepare you for future board service. During your 8-month journey, you will:

- **Complete four self-paced modules** focused on nonprofit management and CFTEA's mission to build a strong foundation in board leadership.
- **Attend scheduled CFTEA board meetings**, gaining firsthand experience in governance and strategic discussion. This includes attending CFTEA's in-person Leaders Conference which includes a board meeting.
- **Review board meeting agendas and materials in advance**, allowing you to participate as an informed and engaged observer.
- **Familiarize yourself with your program sponsor and CFTEA's mission, values, strategic plan, and core programs** to understand the broader impact of your role.
- **Actively participate in at least one board committee**—either the Education or Communications Committee—and have the option to contribute to a special project if desired.
- **Advocate for CFTEA by sharing its value and mission within your professional and community networks**.
- **Stay current on trends and developments** within the banking, nonprofit, and education industries to bring relevant insights to discussions.
- **Adhere to CFTEA's conflict of interest and confidentiality policies**, ensuring professionalism and ethical conduct throughout the program.
- **Support the board's fiduciary responsibilities** by reviewing financial documents and learning the basics of nonprofit budgeting and accountability.

- **Gain an understanding of CFTEA’s strategic planning efforts** and how the board shapes the future of a nonprofit organization.
- **Author two Board Leadership Launchpad Perspective articles**, reflecting on your learning and growth throughout the program.
- **Collaborate with your cohort to complete a final group project**, presenting strategic recommendations to CFTEA’s Board of Directors.

These responsibilities are designed to immerse you in real-world board service while building your confidence, network, and leadership capacity.

## Desirable Personal Characteristics

Participants selected for the **CFTEA Board Leadership Launchpad Program** are emerging leaders who demonstrate a strong commitment to professional growth, community impact, and collaborative service. The most successful participants possess key personal characteristics and traits that align with the values of both CFTEA and effective board leadership.

Ideal candidates should be able to listen actively, think critically and creatively, and contribute meaningfully both as independent thinkers and team collaborators. They should approach each task with professionalism, accountability, and a strong sense of follow-through, including preparing for and fully engaging in board and committee meetings.

Personal qualities such as integrity, empathy, patience, and adaptability are essential, as is a willingness to respect diverse perspectives and contribute to a positive, inclusive learning environment. Participants should exhibit a genuine interest in nonprofit leadership, a commitment to community development, and a curiosity to learn about governance, strategy, and organizational dynamics.

Additional traits include a responsive and respectful communication style, reliability, a sense of humor, and a spirit of service that reflects a passion for supporting others. The ability to balance program responsibilities with professional obligations is critical.

The anticipated time commitment for the program is approximately 25 hours over 8 months. To support participant success, the CFTEA Executive Director will provide guidance and flexibility in scheduling, ensuring time is available for meetings, orientation, and key milestones described in this program. Participants are expected to approach this opportunity with enthusiasm and a commitment to personal and collective leadership growth.

## Application Process Requirements

All application materials should be submitted by email to [info@cftea.org](mailto:info@cftea.org) with the subject line: **“CFTEA Board Leadership Launchpad Program Application.”**

Applicants must include the following items in their application package, submitted as a written letter with supporting documents:

- **Current Resume:** Detailing professional experience, education, and relevant achievements.

- **Cover Letter & Statement of Interest:** This letter should reflect your personality, passion for continued education, and interest in nonprofit leadership. Please include relevant background, leadership experience, professional interests, and long-term career goals.
- **Two Letters of Recommendation:**
  - One letter must come from your **current manager or employer**, confirming support for your participation.
  - The second letter may come from a **colleague or professional reference** who can speak to your experience, character, and leadership potential. Letters should highlight your accomplishments and capacity for growth in a leadership role.
- **Proposed Topics for “Board Leadership Launchpad Perspective” Columns:** Submit two to three topic ideas for reflection articles you would like to write during the program. Your proposals should show originality and an understanding of CFTEA as a nonprofit, its mission, and its value to the community and financial institutions.

For questions or additional information, please contact Andrew Lederer at [info@cftea.org](mailto:info@cftea.org). We look forward to reviewing your application and learning more about your leadership journey.

## Key Experience Checkpoints

- **CFTEA’s Fiscal Year:** July 1 – June 30. The **Board Leadership Launchpad Program** cohort will cross multiple fiscal years.

### CFTEA Board Leadership Launchpad Program Module 1

- Complete Self-Paced Course: Essentials of Board Service
- Complete Self-Paced Course: Getting to Know CFTEA
- Complete Self-Paced Course: CFTEA Board Orientation
- Attend Quarterly CFTEA Board Meeting (*Calendar Appointment Will Be Sent*)
- Download & Review: Sample Board Application
- Download & Review: CFTEA By Laws
- Watch: Board Governance Video
- Watch: Common Board Governance Issues Video
- Download & Review: Ten Basic Responsibilities of Non-Profit Boards
- Download & Review: Conflict of Interest Sniff Test
- Download & Review: 14 Attributes of Thriving Non-Profits.
- Attend Zoom Meeting with CFTEA Executive Director, Andrew Lederer
- Assignment: Module 1 Reflection
- Discussion Forum: Keeping Board Aligned

### CFTEA Board Leadership Launchpad Program Module 2

- Download & Review: Board Binder Checklist
- Assignment: Explore CFTEA Committees (either Education or Communication)
- Download & Review: Seven Steps to a Great Event Speech
- Download & Review: Checklist for a First-Rate Event Speech
- Download & Review: Annual Fundraising Plan
- Download & Review: Pursuing Grants
- Watch: Financial Information the Board Needs Video
- Download & Review: CFTEA Talking Points 2024
- Download & Review: Great Nonprofit Board Member Qualities & Habits

- Attend Quarterly Board Meeting (*Calendar Appointment Will Be Sent*)
- Download & Review: Dealing with Difficult Board Members
- Attend Zoom One-on-One Meeting with CFTEA Executive Director, Andrew Lederer
- Discussion: Researching a Nonprofit of Your Choice

### **CFTEA Board Leadership Launchpad Program Module 3**

- Watch: Why Does Every Nonprofit Need a Strategic Plan? Video
- Download & Review: CFTEA SWOT Analysis (2020 Case Study)
- Download & Review: Surviving a Crisis
- Download & Complete: CFTEA Skillbook Personal SWOT Analysis
- Assignment: Personal SWOT Analysis
- Assignment: CFTEA SWOT Analysis
- Attend the CFTEA Executive Committee Budget Meeting, if available.
- Attend Quarterly Board Meeting (*Calendar Appointment Sent*)
- Attend Zoom Module 3 Meeting with CFTEA Executive Director, Andrew Lederer
- Discussion: Lessons from Your Personal SWOT Analysis

### **CFTEA Board Leadership Launchpad Program Module 4**

- Watch: Board Confidentiality Video
- Watch: Five Things Every New Nonprofit Board Member Needs to Know Video
- Assignment: Board Leadership Launchpad Program Reflection
- Assignment: Final Project & Presentation - CFTEA SWOT Analysis & Recommendations  
(This is a group project)
- Attend Zoom Module 4 Meeting with CFTEA Executive Director, Andrew Lederer to discuss and prepare your group project for the board.
- Attend In Person Quarterly Board Meeting at Leaders Conference(*Calendar Appointment Sent*) & Present Your Final Project
- Assignment: Complete Your Board Leadership Launchpad Program Evaluation

# Board Leadership Launchpad Program



## Gain Practical Hands-On Leadership Experience

**Are you eager to step into a leadership role but don't know where to start?** The **CFTEA Board Leadership Launchpad Program** is designed for professionals who want to gain hands-on experience in board governance before taking on leadership positions in nonprofit organizations or representing their organization in the community on a board.

Effective boards are built on passion, collaboration, and respect. Learning to engage with different personalities, contribute to a respectful board atmosphere, and find common ground while honoring diverse perspectives is essential to strong leadership. The best boards don't always agree—but they listen, communicate, and work toward consensus to drive meaningful progress.

### **What You'll Gain:**

Real-world experience in board leadership and nonprofit management.

Practical knowledge of budgeting, governance, and strategic planning.

Opportunities to connect with experienced board leaders.

Hands-on involvement in CFTEA board meetings and committees.

A CFTEA **Certificate in Non-Profit Leadership and Board Readiness** upon completion.

### **Are You Ready to Lead?**

Contact the CFTEA office for more information.



Center for Financial Training  
& Education Alliance  
*Unlock your potential.*

# CFTEA Board Leadership Launchpad Program Application

Scan to [info@cftea.org](mailto:info@cftea.org)

**Instructions:** Please complete all sections of the application and submit along with the required documents (resume, cover letter/statement of interest, two letters of recommendation, and proposed article topics) to [info@cftea.org](mailto:info@cftea.org).

**Subject line:** CFTEA Board Leadership Launchpad Program Application

Full Name:

Preferred First Name: (if different)

Date of Birth (Must be 18+):

Email Address for Communication:

Phone Number:

Current Employer:

Job Title:

Work Address:

## Section 2: Professional Background

How long have you been in your current role?

Briefly describe your current responsibilities:

Have you participated in any leadership or professional development programs before?      No      Yes

If yes, please specify:

Describe how you worked with non-profit organizations in your past (as a volunteer, etc.)?



### Section 3: Personal Reflection

What interests you about nonprofit board service?

What leadership qualities or experiences do you bring to the program?

How did you hear about the CFTEA Board Leadership Launchpad Program and what do you hope to gain from your participation?

### Section 4: Availability and Commitment

Are you able to commit to a 12-month program that includes quarterly board meetings (3 via Zoom, 1 in person), committee participation, and self-paced learning?

No Yes

If no, please explain:

Are you available to attend the in-person CFTEA Leaders Conference (travel costs not covered)?

No Yes

Are you comfortable writing and submitting two short reflection articles during the program?

No Yes



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**Section 5: Supporting Documents Checklist**

Please confirm that you have included the following documents with your application:

- Current Resume
- Cover Letter & Statement of Interest
- Two Letters of Recommendation (including one from your current employer)
- Two or Three Proposed Topics for "CFTEA Board Leadership Launchpad Perspective" Articles

**Applicant Signature**

I certify that the information provided is accurate and complete to the best of my knowledge. I understand the expectations of the CFTEA Board Leadership Launchpad Program and am committed to fully participating if selected. It is understood that participants in this program are reviewed at the end of each module based on participation and commitment to move to the next module.

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Print Name: \_\_\_\_\_