Build it, or partner?

A brief from CariClub, for firms weighing an employee board program. Many firms sponsor their people to serve on nonprofit boards. This brief shows the work behind a program, so you can decide what to build yourself and what to hand to a partner.

OUR RECOMMENDATION

What a board program is. Your firm sponsors people to serve, as individuals, on nonprofit boards: associate, advisory or governing. Each person is matched to a seat, prepared for the role and supported once they serve.

45%

of 180 large companies reporting to CECP offered a board leadership program to their domestic employees. [1]

CORPORATE PRACTICE

CECP, 2024 data

47.3%

of board chairs, and 41.8% of chief executives, in BoardSource's 2023 survey said recruiting board members is "difficult" or "very difficult." [2]

BOARD RESEARCH

BoardSource 2023, a convenience sample of U.S. charity leaders

80%

of employees serving on boards at four companies said it made them better leaders (self-reported). [3]

BOARD RESEARCH

2018 survey

Two parts, and the work around them. A program needs matching, which finds the right seat for each person, and preparation, which trains people to serve well. Someone also has to run it. The next seven pages list that work, show how it differs by board type and grows year after year, estimate what it costs, name where in-house programs break and who carries the risk, and set out three ways to split it.

OUR RECOMMENDATION

How a program runs.

Match each person to a seat | **Prepare them for the role** | **Support them once seated** | **Review the program each quarter**

The labels. Each researched statement and each recommendation carries one of these labels, so you can see what it rests on.

CORPORATE PRACTICE | BOARD RESEARCH | WORKPLACE RESEARCH | LAW OR REGULATOR | OUR RECOMMENDATION

Run it yourself, or partner?

Some firms ask whether they could run this themselves. They can. Here is the work it takes, so you can compare honestly.

OUR RECOMMENDATION

What you would build and run yourself.

Matching

- Relationships with nonprofits in every city where your people live
- A check of each nonprofit's finances and governance
- Open associate, advisory and governing seats, and what each one needs
- Help for nonprofits starting an associate board
- A match for each person on skills, interests, time and conflicts, with a written reason
- Introductions, then each nonprofit's own selection
- A new match when a seat falls through

Preparation

- Preparation for each board type: associate, advisory and governing
- Practice, and assessments that measure readiness
- Capstones and a credential
- Updates as laws and rules change
- Captions and accessible formats
- Hosting, and support for learners

Running the program

- Enrollment and coordination
- An approval and conflicts check before anyone accepts a seat
- Group reports that hide small groups
- A program review every quarter
- Support once people are seated

Why this is specialist work. Nonprofits mostly recruit through people they know: 94.4% of chief executives in BoardSource's 2023 survey said their boards find potential members through board members' networks. [2] To place people well, you would need your own network, city by city; CariClub's includes 10,000+ nonprofit organizations. Training is a build of its own: BoardLaureate™ prepares associate and advisory members and BoardMastery™ prepares governing members, with 72 sessions between them, practice, capstones and a credential. The next pages show how the work differs by board type, how it grows year after year, what it costs, where in-house programs break and who carries the risk.

BOARD RESEARCH

Every board type is its own build

Each board type is a different build. Associate, advisory and governing seats differ in who serves, how seats are found and what people need to learn. This is what each asks of a program, from our work placing people on all three.

OUR RECOMMENDATION

	Associate boards	Advisory boards	Governing boards
Matching	Seats are often unlisted and fill through members' networks on yearly cycles. Some nonprofits need help starting an associate board first.	Each nonprofit wants a specific skill, such as finance, marketing or technology. Roles range from hands-on to honorary, and openings are few.	Fiduciary seats with a high bar, set by each nonprofit's nominating process, often over months. Checks on finances, governance and insurance come first.
Preparation	Most members are new to boards: how a board works, fundraising and giving, events, relationships and growing from the seat.	Giving counsel without authority, scoping the ask, keeping confidences and handling conflicts, even without fiduciary duty.	Fiduciary duties, financial oversight, risk and compliance, and legal exposure.
Scaling	Firms often sponsor a whole class of rising talent, so you need many seats across causes and cities, every year.	Every seat is a one-off match on a skill, so volume doesn't make it easier.	Fewer seats, each with heavier approval, conflict and insurance work, especially in regulated roles.
Support once seated	A peer community, recognition and a path to advisory or governing seats.	A clear scope and time agreed with the nonprofit, so the role doesn't drift.	Insurance, indemnification and time settled before acceptance, and help through hard board decisions.

In-house programs usually start at the top. Most firms that match people themselves do it for senior leaders, on governing boards: a small group, experienced and the easiest to place. Opening the program to emerging leaders on associate and advisory boards is where the work multiplies: many more people, less board experience and more seats to find every year.

OUR RECOMMENDATION

WITH CARICLUB

CariClub covers all three: BoardLaureate™ prepares associate and advisory members, BoardMastery™ prepares governing members, and CariClub helps nonprofits start associate boards.

Year after year, the work compounds

Year one is the easy year. Each new class arrives while earlier classes are still serving, renewing terms or moving on. In-house, the work grows every year even if the class size doesn't.

OUR RECOMMENDATION

An illustration, not a forecast. It assumes 20 new people a year, each serving a two-year term and renewing it once, four years in all, with one in four people serving needing a new match during the year.

OUR RECOMMENDATION

	Year 1	Year 2	Year 3	Year 4	Year 5
New people to match and prepare	20	20	20	20	20
People serving at once	20	40	60	80	80
New matches for seats that end	5	10	15	20	20
Matches to make in all	25	30	35	40	40
Past participants to keep engaged	0	0	0	0	20
Everyone in the program, serving or past	20	40	60	80	100

From year 4, matching levels off at 40 a year; the program itself keeps growing by 20 people a year. If you start with a smaller first group and grow, as we recommend, every number here grows with it.

What else compounds.

- Nonprofit relationships: boards change leaders, associate boards fill or fold, and contacts move on, so the network needs constant renewal.
- Preparation: content needs updating as rules change, and each new class needs it from the start.
- Approvals: every seat needs a yearly conflicts re-check, so checks grow with everyone serving.
- Reporting: each year adds history to compare and more data to protect.
- The business case: budgets renew every year, and the case has to be made again with evidence.
- People: if the program owner leaves, relationships and know-how leave too.

WITH CARICLUB

With CariClub, past participants stay on Network at no cost to your firm, eligible people get extra matching if they are still searching, and the network and preparation are CariClub's to maintain.

What it would take, in hours and dollars

An estimate, not a quote. It runs the illustration on the previous page (20 new people a year) through public pay data and our own time estimates. The full playbook has a worksheet for your own numbers.

OUR RECOMMENDATION

Building preparation. CariClub's preparation has 72 sessions, each with video, a Board Brief, practice and a Decision Scenario, plus 12 capstones. At 10 to 20 minutes a session, that is 12 to 24 finished hours. A 2010 survey of 249 organizations found basic e-learning took about 79 hours to develop per finished hour, and interactive e-learning about 184. [4] That puts the build at about 950 to 4,400 hours.

WORKPLACE RESEARCH

Estimated hours a year	Year 1	Year 2	Year 3
Matching, at 10 to 20 hours a match	250 to 500	300 to 600	350 to 700
Nonprofit network, at 5 to 10 hours a week	250 to 500	250 to 500	250 to 500
Running the program, at 5 to 10 hours a year per person serving, 1 to 2 per past participant	100 to 200	200 to 400	300 to 600
Preparation: the build, then 2 to 4 hours a week	1,050 to 4,600	100 to 200	100 to 200
Total hours a year	1,650 to 5,800	850 to 1,700	1,000 to 2,000
Total cost a year, at $55 to $62 an hour	$91,000 to $360,000	$47,000 to $105,000	$55,000 to $124,000

What an hour costs. In the New York metro area, median pay in May 2025 was $38.39 an hour for training and development specialists and $43.16 for HR specialists; it was higher in San Francisco, Boston, Washington and Seattle, and about twice as high for managers in these fields. [5] Wages were 70.0% of private employers' compensation costs in June 2026, with benefits the rest. [6] With benefits, a specialist's hour costs about $55 to $62.

LAW OR REGULATOR

Over three years: about 3,500 to 9,500 hours, or $193,000 to $589,000. By year 5, the work grows to 1,170 to 2,340 hours a year ($64,000 to $145,000). In practice, that takes at least one person doing this as their full-time job, because matching and nonprofit relationships run all year: budget a full salary even when the hours come in lower. That is the program team alone: compliance, managers, your executive sponsor and subject experts also give part-time help, not counted here. Nor are video, software, travel, or a manager's higher pay.

OUR RECOMMENDATION

What you keep in-house sets the bill. Partner for training and the preparation row goes. Partner for matching and the matching and network rows go. With CariClub-managed service, most of the running goes too. Approvals and yearly re-checks stay yours either way.

OUR RECOMMENDATION

Where in-house programs break

Programs rarely fail at launch. They fade when the work behind them goes unstaffed. CECP links low participation in board leadership programs to programs that are not staffed, and to the specialized skills and commitment they require. [1][7]

CORPORATE PRACTICE

ANY YEAR

The owner moves on

Relationships, matches and history leave with one person. Write the process down, or let a partner hold it.

YEAR 2 ON

Seats dry up

Associate boards fill or fold and contacts change. A network has to be refreshed all year, in every city.

YEAR 1

Matches miss

A poor fit leads to early exits. Satisfaction and support are among the strongest predictors of volunteers staying. [8]

YEAR 1

People arrive unprepared

Members who don't know the role disengage. Training works best with practice, feedback and support. [9][10]

AS IT GROWS

Approvals pile up

Every seat needs an outside-activity approval and a yearly conflicts re-check. At scale, a queue forms.

AT RENEWAL

There is no proof

Completions and seats are activity, not impact. [11] Without evidence, renewal gets harder.

YEAR 2 ON

Content goes stale

Rules change, as FINRA's October 2026 notice shows. [12] Preparation has to keep up.

YEAR 2 ON

Recognition fades

When a firm doesn't value what people learned, the return can bring strain linked to leaving. [13]

WITH CARICLUB

CariClub runs the parts that break: the network, matching, preparation and reporting. Your team keeps the approvals, policy and recognition.

Who carries the risk

A partner can lower some risks. It can't take on your firm's own duties. No agreement makes board service risk-free, and the answers depend on your documents and state law. Take this page to counsel.

OUR RECOMMENDATION

What CariClub takes on

- Finding and offering seats
- Keeping self-assessments private
- A written reason for every match
- Confirming your approval before a role is final
- Keeping preparation current as rules change

What your agreement settles

- How your people's data is handled and secured
- What happens when someone leaves your firm
- Your gift and conflict policies, in writing
- Who reviews roles for your firm
- Use of your firm's name

What stays yours either way

- Who takes part, decided fairly
- Every approval and conflicts check
- Rules for regulated roles and hourly staff
- Insurance and indemnity for people you ask to serve
- Your privacy promise to your people

Less sensitive data on your books. Cause interests can reveal health, religion or sexual orientation, which California treats as sensitive personal information that people can ask a business to limit. [14] With CariClub, your firm sees group reports for five or more people, not each person's answers.

LAW OR REGULATOR

No implied endorsement. When your firm picks the nonprofits, it chooses which to back. With CariClub, each person chooses where to apply and each nonprofit decides who joins its board.

OUR RECOMMENDATION

"At your request" is still your call. Whether a seat counts as served at your request, for insurance, indemnification and hourly pay, turns on your policy, insurance wording and how the program runs, not only on who matches. [15][16][17] Decide it on purpose.

OUR RECOMMENDATION

TALK TO YOUR COUNSEL

Questions for counsel. Which risks does our program carry, and which would a partner lower? Does a partner change whether seats count as served at our request? What must our agreement cover?

Three ways to split the work

Choose matching, training or both. Whatever you don't choose, your team builds and runs. Approvals, policy and recognition stay yours either way.

OUR RECOMMENDATION

The work	CariClub for matching	CariClub for training	CariClub for both
Nonprofit network and seats of all three types	✓		✓
Help starting associate boards	✓		✓
Matching, with a written reason	✓		✓
Introductions and new matches	✓		✓
Preparation for each board type		✓	✓
Capstones and a credential		✓	✓
Dashboard and group reports	✓	✓	✓
Enrollment, coordination and reviews, with CariClub-managed service	✓	✓	✓

At any size.

Smaller firms

One or two people carry all of it. Each board type needs its own network and preparation, whether you sponsor five people or fifty.

Mid-size firms

You may have learning and giving teams, but building associate boards, matching advisory skills and preparing fiduciaries are specialist work.

Large firms

You can staff it. You would be building networks for three board types in every city you hire, year after year, alongside the work your firm exists to do.

WITH CARICLUB

CariClub offers matching, training or both, run by your team or managed by CariClub, starting with a 90-day or 180-day pilot.

If you partner with CariClub

What CariClub runs. Matching, training or both, for associate, advisory and governing boards. With company-led service, your team enrolls and coordinates people. With CariClub-managed service, CariClub does that and runs four program reviews a year. Every option includes Dashboard, with group reports that hide small groups.

Start with a pilot. Choose 90 days or 180, with a decision review before it ends. One fixed fee covers up to an agreed number of people, and if you continue with annual programs, it is credited once toward your first year.

Day 1	Before it ends	Day 90 or 180
The pilot starts	A decision review	Continue, with the fee credited once, or stop

Each person's membership. Annual programs run 12 months from each person's start, at the level you approve: Foundry, Laureate or Mastery. Afterward, Network membership continues at no cost to your firm, and any employee with a verified company email can join it.

Network	Annual program	After 12 months
Any employee, at no cost to your firm	12 months, at the level you approve	Network continues, with options

What stays yours. Who takes part, every approval under your outside-activity policy, and how you recognize the people who serve. Each nonprofit decides who joins its board.

How to start.

1. **Talk with our partnerships team**
   Share your goals, the cities where your people work and who you hope to include.
2. **Choose the scope**
   Matching, training or both, with company-led or CariClub-managed service.
3. **Agree the pilot**
   90 or 180 days, the number of people and the date of the decision review.
4. **Decide**
   Continue with annual programs, with the pilot fee credited once, or stop.

About CariClub

About CariClub. CariClub places a firm's people on associate, advisory and governing nonprofit boards, prepares them to serve well, and supports them through every stage of service. Building board leaders since 2016.

6,000+	10,000+	130+	12,000+
board placements	nonprofit organizations	enterprise clients	members

> **CariClub helps our young professionals channel their passions into real community impact. It complements our culture of giving perfectly.**
>
> **Paige Costigan**
>
> COO, PJT Partners

> **CariClub is a valuable addition to our efforts — the support and seamless platform elevated interest across every level of our organization.**
>
> **R. Bruce Cameron**
>
> President & CEO, Berkshire Global Advisors

OUR MEMBERS BRING EXPERIENCE FROM FIRMS LIKE THESE

KKR · Morgan Stanley · citi · Davis Polk · Deloitte. · EY

WITH CARICLUB

Talk with our partnerships team: partner@cariclub.com · cariclub.com/employers. For the full playbook, ask for Sponsor Board Leadership at Your Firm.

Figures: CariClub, 2026. BoardLaureate™ and BoardMastery™ are trademarks of CariClub. Sources: [1] CECP, "Giving in Numbers: 2025 Edition" (2024 data). [2] BoardSource, Leading with Intent (2023 survey), "Board Recruitment" brief, 2026, and Databook, December 2025. [3] The Conference Board (A. Korngold), "Nonprofit Board Experience Develops Employees for Leadership," October 2018, and the full 2018 report. [4] Chapman Alliance (B. Chapman), "How Long Does It Take to Create Learning?" September 2010 (survey of 249 organizations). [5] U.S. Bureau of Labor Statistics, Occupational Employment and Wage Statistics, May 2025: median hourly wages for training and development specialists (13-1151) and managers (11-3131), and human resources specialists (13-1071) and managers (11-3121), in the New York, San Francisco, Boston, Washington and Seattle metro areas (accessed October 29, 2026). [6] U.S. Bureau of Labor Statistics, "Employer Costs for Employee Compensation, June 2026," news release, September 9, 2026. [7] CECP, "Giving in Numbers: 2024 Edition" (2023 data). [8] Forner, V. W. and others, "Predictors of Turnover amongst Volunteers: A Systematic Review and Meta-Analysis," Journal of Organizational Behavior, 2024. [9] Lacerenza, C. N. and others, "Leadership Training Design, Delivery, and Implementation," Journal of Applied Psychology, 2017. [10] Hughes, A. M. and others, "The Role of Work Environment in Training Sustainment: A Meta-Analysis," Human Factors, 2020. [11] B4SI, "Framework," web page, and "Sample Guidance Manual: Corporate Community Investment," 2025. [12] FINRA, Rule 3270 and Regulatory Notice 26-20, October 26, 2026; SEC order on Rule 3290, 91 FR 59259. [13] Gatignon, A., "The Double-Edged Sword of Boundary-Spanning Corporate Social Responsibility Programs," Strategic Management Journal, 2022. [14] California Attorney General, "California Consumer Privacy Act (CCPA)," August 2026; California Privacy Protection Agency, FAQ. [15] Marsh, "Outside Directorship Liability Coverage Considerations When Serving on the Boards of Outside Entities," 2017. [16] Delaware General Corporation Law, section 145(a) and (g). [17] 29 CFR 785.44, "Civic and charitable work."