



BOARDS TURNING OUTWARD

Getting Beyond the
Organization-First Approach

BY AARON B. LEAVY



The Harwood Institute for Public Innovation is a nonpartisan, independent nonprofit that teaches, coaches and inspires people and organizations to solve pressing problems and change how communities work together. For nearly 30 years, the Institute has operated within a long tradition of small, catalytic, and public-spirited organizations in American history that have sought to improve public life and politics.



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Organization-First Approach

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A large, stylized sunburst graphic in shades of orange and yellow, centered on the left side of the page. The sunburst consists of a central circle with multiple rays extending outwards, creating a sense of radiance and energy. The background is a solid orange color.

Introduction

INTRODUCTION

Will the community – or your conference room – be the reference point for your choices, your judgments and your actions?

The Harwood Institute for Public Innovation, through its nearly 30 years of work with community groups and leaders in the U.S. and around the world, has found that this fundamental question, perhaps more than anything else, determines the extent to which those seeking to solve public problems will be successful. While it's easy to imagine that the answer to this question is obvious, what we have found, in fact, is that groups – however well intentioned – often become so insular that the community itself becomes squeezed out.

The result?

Organizations that are focused on their own good at the expense of the common good; that are so focused on generating resources that they lose sight of whether their work is having the kind of impact that would warrant support; that are so confident in their own expertise, and best practices, and data, that they fail to deeply understand the people in their community and the context in which they are operating. These “inward-facing” organizations invest incredible time and energy in support of the organization, while professing to be serving the community. And what's worse, the more they retreat into an inward, organization-first approach, the less impact their efforts, the more public trust that erodes, and the less relevant they become.

The alternative to the organization-first approach is to “Turn Outward.” At the Institute, we define Turning Outward as making the community your reference point for choices and actions. This means building a deep knowledge of your community through engaging not only official leaders but everyday people; using that knowledge in a deliberate way (along with data and best practices) to shape strategies and community solutions; and working in a way that not only solves problems, but actually



improves the way the community itself works. Our experience is that organizations and leaders that Turn Outward have more impact and greater credibility and trust. For an organization that is Turned Outward, understanding the aspirations, challenges and concerns of people in the community, and intentionally using that knowledge to drive decision-making, is of paramount importance.

This report builds on previous work of and research by the Institute and looks specifically at the governing boards of community groups. We wanted to find out more about what boards are doing to make sure that the community is central to their decision-making and their strategic oversight of their organizations. We also wanted to learn more about what is standing in the way of keeping community in their line of sight and ways they try to overcome these obstacles. After all, it is the boards of these organizations that are not only charged with fiduciary responsibility, but also make many important decisions that impact overall direction, including appointing executive directors and CEOs.

We spoke with 36 board members around the U.S. (see more on Page 6 for the methodology). While this in no way represents a full sample of the thousands of U.S. community-based boards, there were, with occasional exceptions, clear patterns that emerged.

What our learning suggests is both sobering and cause for reflection: Not only are boards inwardly focused, but there also doesn't seem to be a strong inclination to change.

What we had hoped to find were organizations where boards were more actively struggling with how to get beyond the organization-first approach. We found little evidence of these kinds of boards. However, the conversations we had did point to a series of challenges boards face both in recognizing the need to be more connected to the community and also engaging in behaviors as a board that would make that connection more likely:

These challenges – and the implications for boards of community organizations – are the focus of this report.

BOARDS TURNING OUTWARD KEY CHALLENGES

1 MONEY DOMINATES.

While boards play several roles – the need to raise and manage money dominates the discussions.

2 A NARROW VIEW OF COMMUNITY.

Most board members talk about the “community” as those who interact with the organization’s programming.

3 DIVERSITY AS A SUBSTITUTION FOR ENGAGEMENT.

Board members suggested that their boards’ racial, geographic or ethnic diversity meant they know the community they serve. While nearly all make some version of this claim, only a few recognize that even a diverse board cannot replace engagement.

4 ENGAGEMENT AS EVERYTHING BUT LISTENING.

Board members had different terms to describe their “community engagement,” but most of them were activity-based (i.e. board members volunteering to deliver services) or about educating the public and marketing and had little to do with listening deeply to residents or using that knowledge to shape decision-making. There were a few notable exceptions that represent real bright spots.

5 ORGANIZATION-FIRST METRICS.

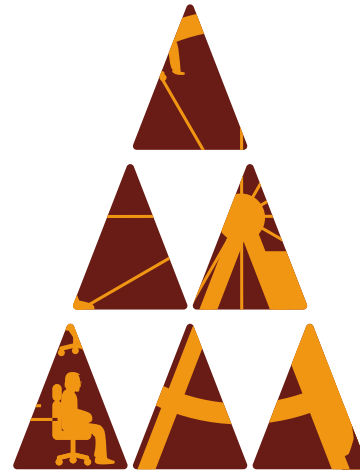
Board members didn’t tend to see metrics as an obstacle; rather, they embraced and see value in them. Most board members, however, are focused on metrics that track the inputs and outputs of their programs, as opposed to measuring the extent to which their efforts were contributing to the health of the broader community.





About Our Research

ABOUT OUR RESEARCH



In trying to better understand how board members think about their work and their relationship to the community we started with a set of five key questions to be answered.

- 1 What frame, or orientation, do these boards bring to their role, and to what extent is that shaping the concerns and issues on which they focus?
- 2 How do these boards think about success or progress? What metrics matter to them, and how do those metrics drive their behaviors and the behaviors of their organizations?
- 3 How do these boards conceive of their relationship to the public and community?
- 4 What constitutes engagement, and where does deliberation fit into their work, if anywhere?
- 5 How do boards think about and approach recruiting new members?

To better understand what, if any, differences there were between board members from different types of non-profits, we looked at organizations in three categories:

COMMUNITY BENEFIT GROUPS

These are organizations with broad-based agendas that go beyond one or two specific issues. Examples include community foundations or United Ways.

ISSUE-SPECIFIC GROUPS

These are organizations that focus on one or two clearly identifiable issues. Examples include health clinics, local ballet companies, or homeless shelters.

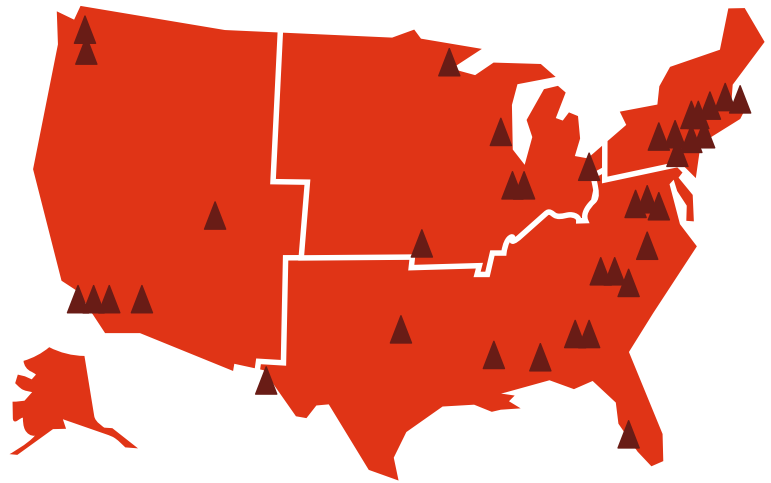
AD-HOC GROUPS OR COALITION GROUPS

These are collaborations of groups in a community established to address a specific challenge. They tend to have a steering committee, made up of executive directors or representatives from the organizations in the collaborative, that operates much like a governing board.

In securing interviews, we sought to find board members representing an array of groups from across different parts of the U.S. and representing different kinds of community-based groups. The charts below document the distribution

of interviews for this project. In keeping with our pledge to those interviewed, identifying information in terms of the name of the organization or individual has been removed and will not be included in this report.

INTERVIEW DISTRIBUTION



REGION	COMMUNITY-BENEFIT	ISSUE-SPECIFIC	AD HOC	TOTAL
NORTH	5	5	0	10
SOUTH	3	9	1	13
MIDWEST	2	2	2	6
WEST	1	5	1	7
TOTAL	11	21	4	36

COMMUNITIES

- | | | |
|----------------------------|-------------------------|----------------------------|
| Hobson City, AL | Bradenton, FL | Philadelphia, PA |
| Los Angeles, CA (3) | Boston, MA (2) | Spartanburg, SC (2) |
| San Benardino, CA | Cook County, MN | Darlington, SC |
| Boulder, CO | Jackson, MS | El Paso, TX |
| Hartford, CT | Kansas City, MO | Seattle, WA |
| New Haven, CT (3) | New York, NY (2) | Tacoma, WA |
| Washington, DC (3) | Youngstown, OH | Racine, WI |
| Atlanta, GA (2) | Durham, NC | |
| Anderson, IN (2) | Lawton, OK | |





Challenges in Turning Outward: What We Learned

CHALLENGES IN TURNING OUTWARD: WHAT WE LEARNED

1. Money dominates

Boards are expected to play many roles. According to the board members we interviewed, the role of the board includes oversight and strategic guidance, defining or stewarding the mission, hiring and evaluating the executive director, developing the strategic direction, raising revenue and monitoring the fiscal health of the organization. Every member we interviewed saw their board as responsible for multiple different roles.

While boards may play multiple roles, one area overwhelmingly dominates their focus and occupies the vast majority of their time – money. Nearly every person we interviewed said that their board spends the majority of its time focused on fundraising or monitoring the organization’s finances. Members recognize that fundraising and fiscal management are essential even as they lament the disproportionate amount of the board’s time devoted to them. “Most board meetings focus on what is the cash flow, what is the status of the staff, and can we get our bills paid,” said one person. “We spend two-thirds of our conversations about money; there’s no way around it. We don’t exist if it’s not there.” Another explained that boards “spend a lot of time focusing on finances and what the organization

“Most board meetings focus on what is the cash flow, what is the status of the staff, and can we get our bills paid.”

has and doesn’t have. They spend more time focusing on that in general. For every board that I’ve worked with and every board that I’ve sat on, their first and foremost concern is what do we have and what do we not have and where are we going to get what we need.”

But while members see fundraising as a critical role for their board, some also recognize that a focus on fundraising can crowd out other roles and other ways the board might contribute. As one board member explained, “As a small nonprofit we talk a lot about money. Not just about what’s coming in and what’s going out, but also how can we diversify our funding stream. If we didn’t have to focus so much on money we could focus more on outreach and education. We could do more. We could do more coalition building. If we weren’t so focused on finances we could improve or expand in other areas a little faster.” Another board member explained that a most board meetings, “it is talking about fundraising. It’s a lot of back and forth discussing how to go about growing. Sometimes we don’t always step back to think about the role of the work within the community.”



2. A narrow view of community

When asked about the board's relationship with the community or how they learn from community, board members present a very narrow definition of community. For most – particularly for the issue specific groups – the community is often collapsed to those enrolled in their programs, their families and stakeholders invested directly in the outcomes of the programming. People beyond those directly connected to the programming are often unconsidered, or at best thought of as people who may one day become interested in the organization's work. Defining community solely in relationship to the organization and its programming typifies an organization-first orientation and an inward focus.

A narrow view of community seems especially prevalent among smaller, less established, issue-specific groups. Among these board members it can be difficult – even when pressed – to get them to consider or discuss community beyond those connected to the work of the organization. For these groups it can seem as though residents, organizations, institutions or funders not directly connected to their work are simply outside their sphere of interest or concern. As one board member reflected, “All the boards

“We really don't talk about the community; we just talk about the people we're serving, and that's about it.”

I've been on, they refer to the community as the beneficiary of their services.” Another member described how most boards' narrow view of community required a change in mindset. “I think that getting organizations to think about themselves as part of a broader ecosystem, it's really a mindset shift that has to take place.” Yet another board member put it this way: “We really don't talk about the community; we just talk about the people we're serving, and that's about it.”

Groups that work across several issues tend to hold slightly broader definitions of the community. Community benefit groups, like community foundations or United Ways, were more likely to speak of the community as more than just a collection of programmatic recipients. And while these groups also viewed the community through an organization-first lens – often defining it as those individuals, groups or institutions impacted or connected to the work they do – the breadth of their efforts meant a correspondingly broader definition of community.



3.

Diversity as a substitution for engagement

Many board members say that their board's diversity proves that they know the community they serve.

The assumption is that someone of a given race or ethnicity, or from a certain part of town, or who works in a specific field, or practices a particular faith will be able to give voice to the challenges, concerns and thoughts of others with those same traits. And then if the board includes enough people with enough of these different traits, it will fully understand the community.

When asked how she and her board came to know the community one person put it this way: "We have a strong board as far as diversity in board representation." Another person said, "We don't have a structured way of doing that. That goes back to having a diverse leadership on the board, so we have people from all walks of life. They have a sense of what's going on in the community."

A smaller number of those with whom we spoke argue that board diversity, while essential, is not enough to know the community. One member from a youth serving organization offered a critique of the idea that a diverse board is inherently able to engage with or represent

the full community: "Cultural competency is something lacking in boards. It's not just looking like those whom we serve. It's not just having people from that demographic. But I wish board members better understand the people that they serve and the challenges and opportunities of the students." Another board member echoed this concern, saying while the board "has a great mix of racial, age and experience diversity, we still don't have enough people with deep experience in the neighborhoods we are working with."

A board member explained that, simply being African-American does not mean she can speak for all African-Americans:

If you're really about the people you're serving, then that means everybody can't be degreed, everybody can't be professional. You need to have those people on the board, and I'm not diminishing their value at all. But I am not representative of low income African-American kids in this community. I got a bachelor's degree. I've got 20 years or experience working. I've never struggled one day in my life. I can speak to their story, but I can't actually speak for them.

“Cultural competency is something lacking in boards. It’s not just looking like those whom we serve. It’s not just having people from that demographic.”

In some communities simply recruiting and retaining members from different racial, ethnic and economic backgrounds proves a major challenge. This is particularly true for organizations located in smaller, more rural areas. In these communities, board members say that numerous nonprofit boards are targeting the same small number of prominent African-American leaders.

One person, who worked to recruit more diverse members, found it hard to identify candidates who were not already overly taxed with work for other boards. She explained, “I think we would be more effective if we were more diverse. I think we could understand some of the communities from their perspective rather than our own or presuming to know. We have tried to recruit more folks. The time commitment is the biggest barrier. We have found people who were leaders in their own community, but they didn’t have time.” Another member from a small community said, “Some of the more visible African-Americans in the community are stretched, being asked to be on multiple boards..”



4.

Engagement as everything but listening

Board members spoke about different ways they “engage” the community. What was largely absent from these discussions, however, was the notion of listening to deeply understand the community as a means to shape more effective work. The community engagement efforts described by board members fall into two general approaches:

A. DIRECT INTERACTION WITH CLIENTS OR PROGRAM PARTICIPANTS

Some board members with whom we spoke, particularly those from issue-specific groups, described community engagement as having a program client – or in some cases several program clients – serve on the board. The rationale, as previously noted, is that these individuals can represent the community. But even this form of “community engagement” has proved challenging for some boards. Several people described selecting residents or clients to serve on the board only to have those new members resign because of family obligations or work pressures. One member, whose organization previously mandated that

more than half of all board members be residents of the affordable housing units the organization constructed, described the challenges he saw in this approach:

Until 2005 the requirement was that 51 percent of the board had to be residents of the housing units. That was unworkable by and large those are residents don't have the skill sets necessary to be on a board. Frankly they don't have the time to participate in board functions. Typically these are families or single parents with children holding down several jobs. There's no time to function as a board member. We still have one resident on the board. We have the same issues as before. It's a woman with three kids, and she just doesn't have the time to devote to the board activities.

Another member reflected on her organization's challenges with bringing a formerly homeless “client” onto their board. She felt the benefits were well worth it but recognized that for many

other boards this was not something they were willing to do:

I was previously on a board that asked for a formerly homeless person to be on the board.

That meant you were going to have someone that's sitting on your board who is not educated for the most part, a little rough around the edges and has opinions that differ from the group. We really had to work with our person, and we had to work with the group to be respectful of that person. And it was uncomfortable in the beginning. He ended up being able to provide valuable insight to decision making. But I don't know that most boards do it. If the goal was really to have a better understanding of the community, more boards would do things like that. But it is uncomfortable.


While some boards find it difficult to include clients or program participants, others do not. Those that are more easily able to include clients on the board seem to be groups whose services cut across the economic spectrum. This may make it easier to identify members from more professional backgrounds or with greater free time to devote to the work of serving on a board. One member from an organization that provides access to reproductive health explained that she knew the board included clients or those with direct experience but did not know whom. This stands in contrast to the earlier example from

the housing organization where it is very obvious – at least to the member interviewed – who on the board lives in the organization's affordable housing units.

Another related but slightly different engagement approach members described was encouraging or requiring board members to volunteer and provide direct services to clients. Several board members, particularly from smaller direct-service organizations, explained that they understood the community by working with "clients" or members of their programs. These board members say they know about the lives of those their organizations serve through volunteering as part of the organization's programming. Some talked about serving meals at a homeless shelter while others attended organizational programming for seniors.

A board member for a homeless shelter in a large Northeastern city explained, "Most of us have a direct interaction with the clients. I have a sense of who our clients are by being there. That's true for the majority of the board."

One board member described how she and others on her board combine work with the girls served by the organization as well as parents and counselors to get a more complete picture of their lives. "We are constantly working with the girls – as board members. You have to commit so many hours working with the girls and volunteering with them in order to be part of the board. We also get feedback from the counselors and courts about the girls. We work closely with parents if we are able. So we get feedback that makes us aware of things we need to take into consideration."



Community engagement expertise a “nice to have” in board recruitment



As members explain it, the first consideration in evaluating potential board members – after determining that they are passionate about the organization and its work – is their professional experience. So when the people with whom we spoke talked about the diversity of their board, most immediately began to list off the different professions, or sectors represented. Board members stressed the need to include members from different professions and with types of skills in order to create a functioning board. Diversification of experience and skill is seen as absolutely critical.

In addition to professional experience, people talked about the need for different skill sets or traits like the ability to raise money, or a broad personal network, or connections to the business community among others.

One board member described what she was looking for in members by saying, “You want people who are passionate. You want people with finance and accounting backgrounds. Legal is always good. You want that covered.” Another explained that her board has worked hard to diversify, saying, “We have a foundation director on the board, people in the business community, a CPA, people who are strong in marketing.” According to a third member, “Especially in small nonprofits, they need someone who can help look at financials or someone who can answer simple questions about law.”

An ability to engage or a profession that ensures direct interaction with the public is rarely considered a critically needed skill or talent. Very few board leaders described engagement as a skill or capacity that their board valued. Many said their board seeks out members with diverse networks or spheres of influence. However, for most of the leaders, members with varied networks contributed to the board’s capacity to raise money or communicate the organization’s value.

As one member explained when asked if community engagement experience or ability would be considered when selecting a board member, “[Community engagement expertise] is a nice to have rather than on par with the other skill sets. The way that a lot of boards treat it is, ‘It’d be great to have.’ But it’s not the same as other skills.” One board member that had served on multiple boards over the years explained, “I think that there’s a view held in nonprofits that staff should pay attention to this issue of community engagement, but that doesn’t hold for board members. Leaders want staff who have that experience and board members who have it is a good thing, but it’s not a necessity or requirement.”

B. ENGAGEMENT AS "MAKING YOUR CASE"

For some, engaging the community means going to fairs and festivals and sharing information about the organization, its services and programs, and making the case for its importance. What might sound like community engagement is actually much closer to education. One board member explained that they engage the community through, "a lot of health fairs and a lot of speaking engagements. We have to constantly reach out to the uninsured to get them to know about our services." Another said, "We try to get the community engaged in what we're doing. Try to get as many people knowing what we're doing. The board leaders have a lot to do with how engaged the community is. We're hoping to expand our reach in terms of people becoming more familiar with our brand and efforts."

Others talk about engagement as marketing or public relations – describing local news coverage as a sign of engaging with the community. One board member celebrated the impact of engagement saying, "We've engaged the community a lot; they've come flocking to us. We don't advertise really." Another described their engagement efforts this way: "The local newspapers are very generous in giving us news coverage when we are having events or want to

“The local newspapers are very generous in giving us news coverage when we are having events or want to announce something.”

announce something. They'll take pictures and give us good publicity. The community knows about us. We've said what we are and what we're doing." Still another spoke about engagement as a form of stakeholder recruitment or fundraising, "I like engaging the community and engaging a greater percentage of stakeholders. Get more of their support financial and otherwise; that's what we're working towards."

For these groups, engagement is something that the organization does to or for the community. The idea of engagement as a process to learn from the community is quite rare. More often engagement is described as a process of teaching, rather than learning. This dynamic was illustrated by a board member who explained that their organization learns about the community by having their executive director "go to the medical practices and the hospitals and the churches, and she lets people know that we are there, what we are there for." Another simply explained that his hope for engagement was that more students would learn about and choose to participate in his organization's program.



A broader take on engagement



Among the people interviewed, there were a small number of examples of those whose boards did take a broader view of community engagement. These people represented groups that tended to be ad-hoc coalitions or broader community benefit groups. For them, engagement does include understanding their community more deeply and using that knowledge to drive decision-making.

For example, one person described how working with the organization's youth advisory board helped them create a new program. "Our youth advisory board sees things we don't see. They're the ones that brought to us and to the health department the fact that there's incredible heroin use in town. They were concerned and reached out and a number of programs were developed as a result." Similarly the chair of a community foundation explained that she and the rest of the board were holding a series of listening sessions to be able to answer the question, "What's our role, what should our role be based on what we have learned and what we have heard?" Another group worked to train their board members in how to do listening sessions with the community. Board members then shared what they learned from these conversations with other community leaders to discuss the implications for how they could work better together.

In perhaps the most complete and compelling example of a board deeply invested in knowing their community, a board chair described how knowledge of the community informs everything from selecting board members to identifying programming. He explained that in fact he was selected to chair the board in large part because of his community engagement experience and skills.

"I was asked to become part [of the board] because of my connectivity with the community. As [a police] officer in 1995, I wrote a grant for community policing. Under our community policing philosophy, we depend on community input. So we meet with neighbors and ask about what they're interested in. We talk with them and ask things like: Do you want cameras in your neighborhood, or is that offensive? We have a spirit of inclusive work. It's inclusive. It's not laissez faire. And I think it's an understanding that if you're going to fix problems you have to ask them what the problems are."

The chair then explained the role engagement plays in shaping the future of the organization:

"It plays a major role. Our decision-making is influenced by feedback. If there's self-interest rather than community interest we have to filter that. So we do multiple community conversations. If we do 10 conversations in 10 neighborhoods and the same issue comes up six times – it's not an isolated concern. That gives us a clear indicator that it's something we should focus on. I was just a part of that whole process. We have done them in homes, in the schools. I suggested this to our president – we're going to do one at one of our community policing homes. That will give me a great perspective as chair and chief. I'll hear the good, bad and ugly about [our organization] and our department."

The board used a series of community conversations to help focus its work and identify the key issues to target. "Board members are encouraged to go to community conversations," he said. "Sometimes it's better to be there to feel it and taste it yourself."

5.

Organization-first metrics

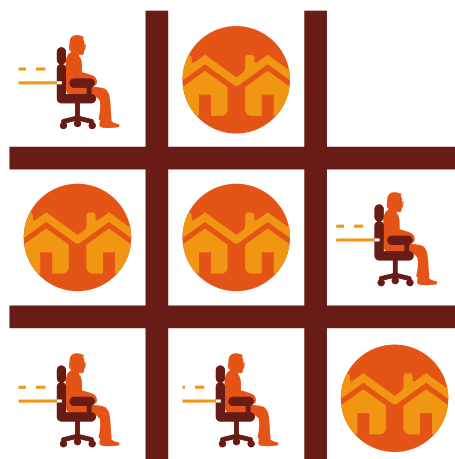
The board members with whom we spoke see metrics as a valuable tool for managing the organization, whether in evaluating the programs, making the case for funding, or keeping track of the number of people served. They did not seem to view metrics as an external obligation – something only done to secure additional funding – but instead described metrics as something critical to the functioning of the organization. And while tracking data on programs may help them to raise money, the board members with whom we spoke see metrics as helping them to determine if their programs are having impact. One explained the value of metrics to his organization saying, “We have to use it to hold ourselves accountable. The data will tell us if we’re successful.”

One member explained the value of metrics saying, “Metrics help keep us on track and allow us to grow in the programming and in the services we offer. They also matter for us to gain additional funding. We need to do it to keep our funding, and we also need to do it as healthcare providers. In healthcare it’s all about tracking and outcomes and meeting standards. We do it for

“We really don’t talk about the community; we just talk about the people we’re serving, and that’s about it.”

both reasons.” Another member simply said, “You can’t manage what you don’t measure.”

The metrics that most members described tended to focus on the inputs and outputs of a program. The most common metrics used by these organizations counted the number of participants (students in the program, or people attending an event) and the amount of service provided (number of meals served, hours of mentoring). These metrics focus first and foremost on the program itself and how many people it is reaching, and how many units of service it is delivering.



“We have to use it to hold ourselves accountable. The data will tell us if we’re successful.”

Far fewer were able to take the next step to consider how to measure the efficacy of the programs, their impact on people’s lives and whether such programs were improving the way the community itself worked. These groups moved beyond counting inputs and outputs and worked to identify the impact of their programs. Metrics used by these groups varied – just as their work varied; some groups tracked student performance before and after their involvement with a program, and others looked at the number of formerly homeless individuals who after interacting with the nonprofit had stable housing and jobs.

While nearly all of the board members spoke about having at least a basic set of metrics, few board members described using these insights to shape the direction of the organization, or even how it impacted the way they ran their programs. Metrics, for most board members, were a way of determining whether the programs were growing or shrinking, or whether they were more or less efficient. Where data was being used to shape organizational direction, it was usually in terms of how to effectively expand client services.

Said one board member, “We want to make sure we’re making a difference. We are measuring our difference. We measure and make decisions accordingly. We’ve grown as a result of seeing where we could grow based on our data.”

Metrics getting beyond outputs or clients served have proven difficult to develop, according to some of the board members with whom we spoke. Some have found funding to hire statisticians; others are at the initial stage of building out more robust measures. There is widespread recognition of the value of metrics; however for some groups the capacity and expertise to gather and analyze data is simply not present. Said one person, “We have not gone to other metrics. Those would be good tools. With our board structure to put together metrics or to afford someone to put those together it would be implausible.”









Implications for Boards

And Questions
to Consider

IMPLICATIONS FOR BOARDS AND QUESTIONS TO CONSIDER

All of the board members we interviewed spoke at length about their passion for the work their organizations are doing, its importance to people's lives and their personal commitments to the work. And in most cases, their boards are meeting their basic duties. Looking at BoardSource's¹ Ten Basic Responsibilities of Nonprofit Boards² we see that these board members are, for the most part, focused on the very kinds of roles and processes that experts suggest are vital for an effective board. These include:

- 1 Determine mission and purpose.** It is the board's responsibility to create and review a statement of mission and purpose that articulates the organization's goals, means, and primary constituents served.
- 2 Select the chief executive.** Boards must reach consensus on the chief executive's responsibilities and undertake a careful search to find the most qualified individual for the position.
- 3 Support and evaluate the chief executive.** The board should ensure that the chief executive has the moral and professional support he or she needs to further the goals of the organization.
- 4 Ensure effective planning.** Boards must actively participate in an overall planning process and assist in implementing and monitoring the plan's goals.
- 5 Monitor and strengthen programs and services.** The board's responsibility

is to determine which programs are consistent with the organization's mission and monitor their effectiveness.

- 6 Ensure adequate financial resources.** One of the board's foremost responsibilities is to secure adequate resources for the organization to fulfill its mission.
- 7 Protect assets and provide proper financial oversight.** The board must assist in developing the annual budget and ensuring that proper financial controls are in place.
- 8 Build a competent board.** All boards have a responsibility to articulate prerequisites for candidates, orient new members, and periodically and comprehensively evaluate their own performance.
- 9 Ensure legal and ethical integrity.** The board is ultimately responsible for adherence to legal standards and ethical norms.
- 10 Enhance the organization's public standing.** The board should clearly articulate the organization's mission, accomplishments, and goals to the public and garner support from the community.

The question for boards is one of orientation: Are they turned inward, toward their own programs, or will they Turn Outward and make the community itself the reference point for their choices and actions? How a board fulfills these 10 responsibilities, in our experience, will look quite different depending upon the answer to that question.

¹ BoardSource is a nonprofit "dedicated to advancing the public good by building exceptional nonprofit boards and inspiring board service." It is also "the go-to resource for nonprofit organizations looking to strengthen the effectiveness and impact of their leadership at the highest level — the board of directors (<https://www.boardsource.org/eweb/DynamicPage.aspx?Site=bds2012&WebKey=4f48fa0d-b122-4988-8ffc-7b2ad020981f>)"

² Ingram, Richard T., *Basic Responsibilities of Nonprofit Boards* (BoardSource)

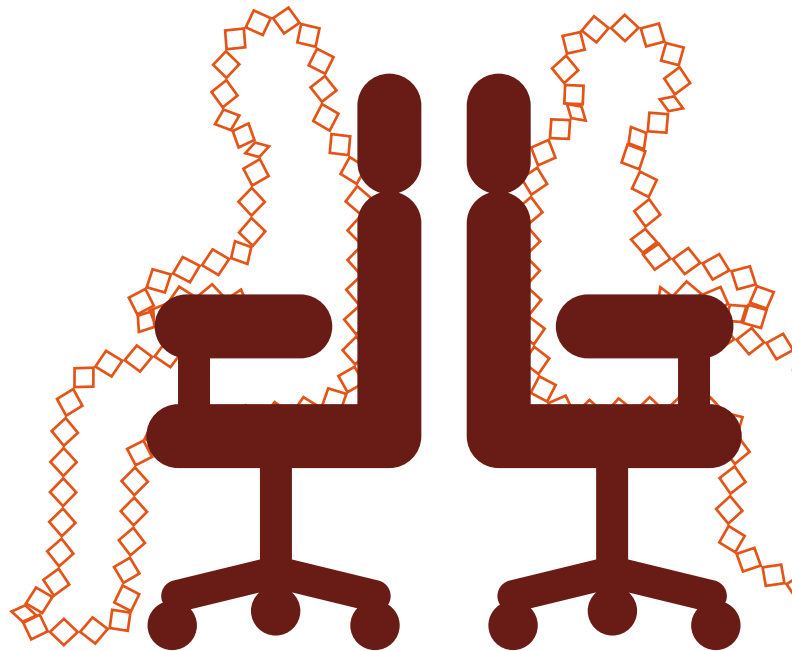
Take No. 2 on the list as an example. A board that is Turned Outward will recognize that it is critical to recruit a chief executive that values listening to the community and using that knowledge in developing programs and strategies to fit the community's context. Recruiting efforts will be designed to find these candidates and to ensure that they are thoroughly vetted in this regard.

This report outlines some clear challenges for board members in being Turned Outward and making the community a focal point of how their boards make decisions. The opportunity for boards is to think not about how they can add on more work and responsibilities, but rather, how they can fulfill their duties without losing sight of the community.

Here are some important questions for boards to consider after reading this report:

1 To what extent are we as board members listening to and learning from the community, in formal and informal ways? And when we do listen, are we listening to more than those served by our programs and our donors?

As described earlier in the report, for some board members community engagement means telling people about their programs, educating them about their issue, or seeking brand/organizational recognition. While each of these has value, it is damaging to think of these efforts as community engagement as they do little if anything to promote building the kind of knowledge that could help make your work more impactful. Other groups engage the community but in a



limited fashion. For these boards, direct interaction with clients is the main form of community engagement and tends to come from board members volunteering to serve clients, or having one or two clients serve on the board. More robust, meaningful and valuable engagement requires organizations and boards to engage beyond just those they serve. And to engage people in conversations about their lives, not just their interaction with programming or the organization.

2 To what extent is our board leaving time, or intentionally creating time, to discuss and review what we are learning about the community?

According to board members, a focus on fundraising and fiscal management dominates board meetings. Other key roles – particularly engagement – are crowded out by the focus on money. Just putting aside 30 minutes in each board meeting to talk about what board members and the organization are learning through their interactions with people in the community can begin to shift the board's focus outward.



3 When we talk about “the community,” how broad is our definition? Does it include those not directly connected to our programming?

For many of the board members with whom we spoke, the community is narrowly defined. The community, as they describe it, is primarily made up of those directly involved in the organization’s programming. Others expand their definition to include those indirectly involved such as parents of clients or other organizations with a vested interest in the program results. Few organizations defined the community more broadly, to include those who may never directly leverage services – but those groups with the widest definition of community also had the strongest examples of knowledge from the community shaping their work.

4 When we think about recruiting new board members, do we consider experience with community engagement as a critical skill or capacity?

Most boards begin the search for new members with a desire for professional and skill-based diversity. Lawyers and accountants are particularly prized as they help address the legal and financial management concerns that often dominate board meetings. However, most boards target professionals to the exclusion of others with key skills. And very few board members we interviewed suggested that experience with engagement was a skill valued by their board. If engagement experience is not considered in board member selection or at best treated as a “nice but certainly not necessary” boards will continue to struggle to engage the community.

5 In addition to professional and skill set diversity, do we seek diversity in race, ethnicity, age and socioeconomic status? If so, do we expect members to speak for their racial or ethnic groups, or do we use our diversity as a way to open up conversations with more people in the community?

Boards are looking to become more diverse. A board comprised solely of wealthy, older, white men is no longer seen as acceptable or appropriate. While many organizations struggle to diversify their boards, it is clear that the majority are working to do so. However, for many boards diverse membership – particularly diversity in terms of gender, race and socio-economic status – replaces the need to meaningfully and intentionally engage those groups. Having boards with racial, economic, religious and gender diversity makes it easier to more deeply engage the full breadth of the community – it cannot be expected to replace that need.

6 Are we focused on inputs or impact? Are our metrics helping us keep our eye on the ball or taking our focus off the larger community?

Most board members see their organization’s collection and analysis of metrics as a valuable tool for the organization and for them as board members. The majority of metrics focus on measuring programmatic inputs and outputs: the number of people served and the amount of service provided for given cost. Some members went further to describe metrics that measure the impact of programs on clients’ lives. But at every turn, the conversation about metrics turned inward – back to the organization and its programming – and away from consideration of broader community impact.

CONCLUSION

No doubt that this report may seem to many a bleak assessment of the relationship between organizational boards and communities. There clearly exist real barriers – structural and otherwise – for boards to have the community itself in their lines of sight.

For leaders of organizations and board members alike, we cannot gloss over or minimize the significance of those barriers. Instead, we must be willing to tackle them head on. And we can.

But where do we start? In almost every conversation, people interviewed expressed a strong desire for the organizations they served to be better engaged with and connected to community. At the same time, many felt that boards themselves could play a bigger role in helping to make these connections happen. Therein lies the answer.

The opportunity for board members and organizational leaders alike is to tap into that very real desire; to use these findings and reflection questions to deeply examine their own efforts; and to find one or two areas where they can shift their behavior and act – today. Only then will boards begin to move beyond the organizational-first approach.

