



TO GOVERN WELL,

CREATE A LEARNING AGENDA

Use this process to boost your board members' individual and collective knowledge.

By Marty Martin

Through their decisions and actions, board members shape the nonprofit organization they serve. But every board operates with two primary constraints — time and knowledge. To manage successfully, a board must master both efficient use of its time and effective use of its knowledge. By establishing a learning agenda, a board addresses both constraints.

Why a Learning Agenda?

Board members come with diverse backgrounds, education, experience, and skills. To be effective, each board must develop a common knowledge, understanding, and language.

While there are many components for a successful board, one seldom considered is a board's ability to learn. "The essence of leading is not commanding, but teaching," as Noel M. Tichy points

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out.¹ "It is opening people's eyes and minds. It is teaching them new ways to see the world and pointing them to new goals... [I]t is teaching them to share their own knowledge and teach others."

What benefits flow from a learning agenda? First, a focused learning process stimulates a culture that values learning, changing, and adapting. A learning board sets a tone for the rest of the organization.

Second, a learning agenda creates a clearer understanding of the organization's operating environment. A board then becomes better able to employ what one author

calls "the four pillars of high performance," which are an organization's "alertness, agility, adaptability, and alignment."² Each pillar tests an organization's ability to learn and apply knowledge effectively.

Finally, through a learning agenda board members are better able to give meaning to their efforts and convey that meaning to their internal and external stakeholders. Over time, this helps everyone get "on the same page" and builds alignment throughout the organization.

How to Develop a Learning Agenda

How does a learning agenda work? Here are the steps a board should take:

1. Convene a brainstorming session for board members, perhaps during a board retreat. At this session, have board members systematically identify areas in which

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they need to become more knowledgeable. Sarbanes-Oxley, planned giving, risk assessment, employment law, strategic leadership, and financial management are just a few of the many areas in which nonprofit boards now must be proficient in order to govern effectively and legally.

2. For each topic identified, assign a board member to learn about it. The designated member will then circulate information on this subject for the board to review. Board members should be prepared to discuss this topic at an upcoming board meeting. This process has a number of benefits:

- **People learn material** most thoroughly when asked to teach.
- **Members enhance their leadership capacity** and their motivation to contribute at board meetings.
- **The process develops many “go-to” people** on the board.
- **Quieter board members have a way to contribute.** This process engages them by drawing out untapped capabilities.

• **Board members can apply what they’ve learned** in other contexts beyond their organization.

3. At a board meeting, have the designated member lead a discussion on the assigned topic. Focus the conversation on how the board will apply this material to your organization. The result is collective learning that is simultaneously dynamic, reflective, and applied — ideal for adult learning.

4. As part of the board’s discussion, have the designated member prepare a memo summarizing key points, and integrate it into the minutes. This memo will serve as a reference point for current and future board members. Collectively, such memos will provide a history of the board’s thinking and its rationale for change. New board members can review these memos during their orientation to come up to speed more quickly.

How Board Meetings Will Be Improved

Using a learning agenda will enliven and enrich board meetings. Expanding board members’ knowledge in this way focuses their conversation on what they need to do and how to accomplish their goals. A learning environment enhances a board’s overall capacity to meet the organization’s mission. Which is, after all, why the board meets. ■

Footnotes

¹ Noel M. Tichy, *The Cycle of Leadership* (New York, New York: HarperCollins Publishers, www.harpercollins.com).

² Paul C. Light *The Four Pillars of High Performance* (McGraw-Hill, www.mcgraw-hill.com).



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A Board Learning Kit

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- **Board Retreats: The Wave of the Future** (Vol. 22, No. 4)
- **Expectations for Nonprofit Boards Are Changing** (Vol. 19, No. 3)
- **Board Member Self-Assessment** (Vol. 15, No. 6)
- **The Sarbanes-Oxley Act & Nonprofits** (Vol. 22, No. 5)
- **Rule Requires Board Members to Be Expert Investors** (Vol. 14, No. 1)
- **Long-Range Financial Planning: The Board’s Role** (Vol. 11, No. 6)
- **Leading the Transformation of Boards** (Vol. 22, No. 2)

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