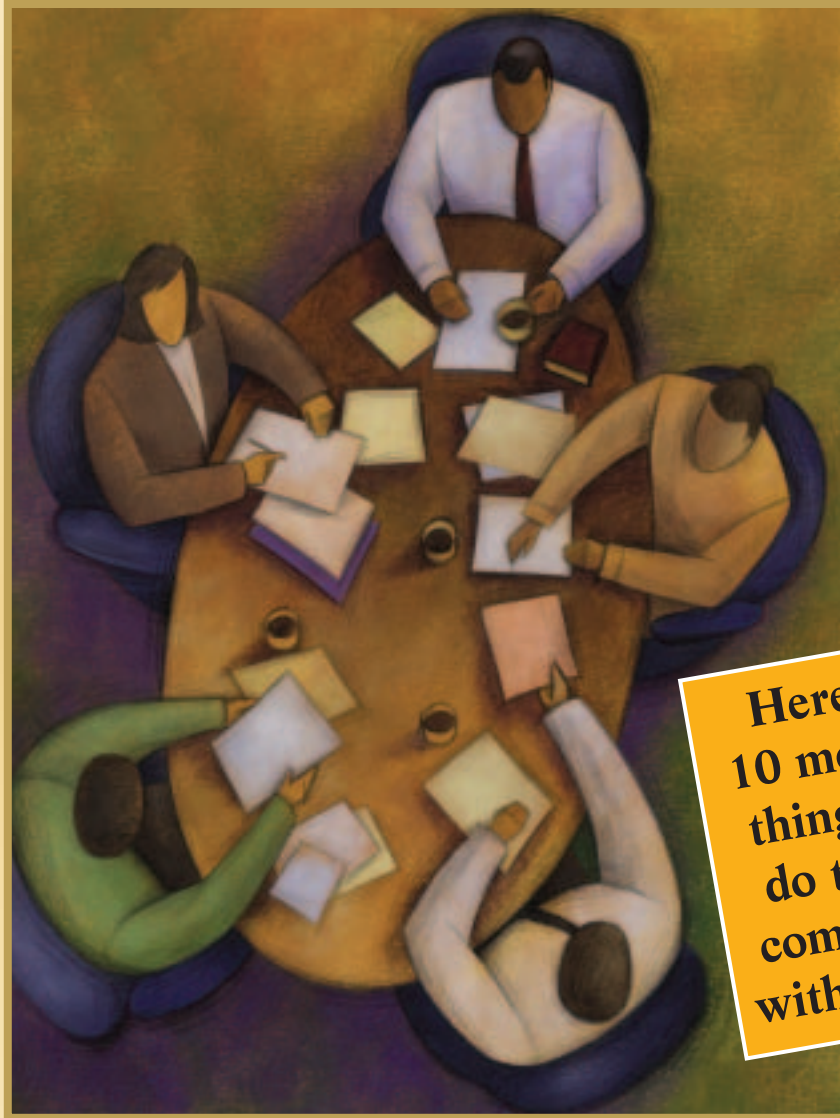


How to Talk to YOUR BOARD



Here are the
10 most crucial
things you can
do to improve
communication
with your board.

by Larry D. Lauer

One of your most crucial jobs as a nonprofit executive is to communicate with your board. Only if you communicate effectively with board members will they stay motivated and productive. Here are 10 steps to powerful communication with your board:

1. Nurture Relations with Your Board Chair.

Your success hinges on your relationship with the board chair. When seeking a new chair, look for someone who's on your wavelength, who shares your organization's communication and management styles.

For example, businesspeople accustomed to an autocratic style may want to run the show rather than create a team. If possible, avoid such people. If that's not possible, use these techniques to defuse the situation:

Give Them Strokes. Appreciate the good qualities they bring to the board, and express your apprecia-

tion often and loudly. Just giving them the recognition they crave will often work miracles.

Gain Support from the Whole Board. Cultivate overall support so that disagreements between you and the chair won't develop into serious matters. Bring other key board members up to date – letting others initiate any comments about the chair's performance. Your objective is not to talk about the chair, but to impress other board members with your leadership.

Keep Disputes Private. Take care not to disagree with the chair in public or in open board meetings. Bringing a disagreement into the open can cause a disastrous split. Even if you are right in principle, you may lose the support of good people as a result.

Keep All Board Members Informed. Launch a regular program of telling all board members everything the organization is doing. Accurate information can help put an over-zealous board chair in perspective.

2. Revisit Your Mission.

It's essential that you meet periodically with your board to discuss your mission – what your organization was founded to do. Picking the right time for such a discussion can unite the board with a crucial sense of purpose.

The right time is usually an annual retreat or special meeting. If there is no clear mission statement, the first assignment is to write one. If there is a clear statement, it is productive to re-articulate it in light of current marketplace conditions.

With the mission statement as a guide, ask board members if the organization is still on track. If they believe it is, move on quickly. If they don't, list the reasons why and take these reasons to the staff for further discussion. Then bring staff suggestions to the next board meeting. Even disagreements will lead to greater commitment by both board and staff.

3. Emphasize Your Vision.

While mission is what the organization came into existence to do, vision is what it wants to become. To some organizations, vision is a broad statement of expectations and desired recognition. Others state their vision in the context of specific objectives.

Many CEOs are criticized for lacking vision or being unable to articulate it. But the truth is, different people mean different things by the term. So, the first order of business for a board is to define what "we" mean by the word. What factors must go into expressing "our" vision? What statement do members expect leadership to be making?

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Again, you and your board should revisit your vision statement periodically, perhaps annually. How have environmental conditions changed? How does the statement hold up? If it needs revision, take the time to do it. Share the board's ideas with the staff, and bring staff members' thoughts back to a later board meeting.

This is all an exercise in building a unified team, and none of it will be a waste of time. In fact, it will increase your board's enthusiasm for what you do. There's nothing like the joy of serving on the board of an organization that knows where it's going.

4. Prepare a Board Policy Manual.

We all know that "the board establishes policy," but the word "policy" often creates confusion. "Policies" are simply the principles which guide management decisions in fundraising, financial management, marketing, operations, personnel, and communications.

Produce a book for the board which describes all these policies in one place, in simple, non-legal language. Your board policy manual should include the following information:

Fundraising policies should declare that all board members are expected to raise funds and contribute their own money to the organization. Board members should approve all budgets associated with raising funds as well as annual fundraising goals – including how much each of them will give. They should be available to rate the giving potential of prospects from lists provided by staff and consultants. They should agree to make solicitation calls, by themselves or with other volunteers or staff. And they should give generously themselves – so that they won't just be asking for money but asking others to join them in supporting the cause.

Financial management should be clearly identified as a board responsibility. Approving the budget, establishing safeguards related to audits, and overseeing investments are board tasks which must have policies to guide them. Some organizations have a balanced budget as policy; others will permit deficits under specific conditions. All must review audits and investments and have policies guiding the selection of those who perform these services.

Your **marketing policy** should explain what percent of your budget will be spent on marketing activities. It should also list the marketing duties you expect the board to perform. For instance, you might have board members make speeches. Or start word-of-mouth efforts with community opinion leaders. Or ask printers or PR agencies to donate services. Or organize special events. Design your marketing policy to motivate members to tell "the story" on a continuing basis.

Operations policies should clarify the board's role in managing the organization's affairs. Board members shouldn't have control of daily transactions. They should

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take a wide view, making sure that management methods are advancing the organization's culture, mission, and values.

Likewise, **personnel policies** should make it clear that the board has no authority over hiring or firing anyone except the executive director. Again, their role is a broad one. They must insure that benefits are appropriate and that personnel laws are followed.

Few organizations have **communications policies**, but they should. Such policies should answer the following questions: What communication functions will board members and executives perform? Are they expected to go into the community and tell the organization's story? What priority is communication given in the organization? What are the procedures to follow with sensitive issues and crises?

5. Draw a Clear Financial Picture.

If fiduciary responsibility is a primary board responsibility, giving your board good financial information is critical. Be careful, however, not to give them too much. The key is to give them only what they need, in a form they can understand.

Prepare a simplified financial report especially for board members. It should include a simple list of income categories, expense categories, balances, investments with performance noted, and issues of concern. This format will provide all the data board members need. Of course, the finance committee should ask for more information if questions come up which require deeper inquiry.

6. Create a Board Newsletter.

A board newsletter is an essential way for you to keep board members informed. A newsletter will insure that political issues and leadership styles won't get in the way of all board members receiving the same information.

The format of such a newsletter will vary from organization to organization. Desktop publishing allows many formats, ranging from one laid out to look like a printed piece to a conventional letter on the CEO's letterhead. A memo-style format, using separate headings and brief explanations, works well. List activities and accomplishments, the status of on-going issues, and any new financial information – including new gifts, bequests, income, or surprise expenses. Applaud board and staff achievements.

While you can call your newsletter "periodic," you should

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send it out at least quarterly. Bimonthly or monthly would be better. It should arrive frequently enough that board members feel a kind of dialogue with the CEO.

CEOs often say they don't have time to produce such a piece. Usually, however, someone has already compiled the necessary information – activities, on-going issues, finances. That same person can put the information on a few sheets of paper, and the CEO's task is one of simple editing.

We make time for what's important, and a board newsletter is one of the most important things a CEO does for the board. It's the difference between feeling in touch and impressed with the organization and feeling unmotivated and uninvolved.

7. Be Sure Meetings Run Smoothly.

Using a newsletter to report on activities means that you can keep board meetings short and uncomplicated. During board meetings, you need give only a quick review of activities.

The board meeting agenda and format should be simple. The chair should lead the meeting, the CEO should be allowed to comment on each agenda item, and the number of items should be limited so that good discussion is possible.

The board agenda can be set under three basic headings: (1) what is going on, (2) problems and issues for discussion, and (3) financial update. Don't provide too much material; keep it as simple as possible. Otherwise, boards can get bogged down in detail and lose sight of the big picture for which they are responsible.

8. Hold Social Events.

Communication theory tells us that the better people know each other, the better they communicate. When people's experience overlaps, they have not only a shared background but a common understanding of the meaning of words. When they come to like each other, they have more tolerance of their differences. When they share a common purpose, they will work harder to keep their differences from slowing progress.

Thus, board activities such as annual dinners, picnics, receptions, and parties are vitally important. Keep in mind that this is not just play; it's serious business. It's essential communication, pure and simple. And it's necessary for team building and unified action.

9. Show Appreciation Constantly.

Recognition is important not just for the few hard workers but for every board member. It can't be periodic; it must be constant.

One volunteer for a university athletic program is especially effective at giving board members constant recognition. Every time he visits them, whether it's to ask

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for a favor or thank them for helping, he takes something with him. It might be a cap or T-shirt or ticket to the next game. He has a frame shop on stand-by and frames everything from newspaper articles to old football jerseys. He even mats and frames ticket stubs of memorable games to give to those who helped.

Yes, such recognition costs him money. But he spends less than you might think, and the results are almost unbelievable. People do what he asks and feel good about it.

The lesson is that you simply can't recognize people too often. Try the athletic program volunteer's approach, and you will be amazed. Take your organization's T-shirt when recruiting a board member. Give out coffee mugs, key chains, or other tokens whenever you have a chance. Frame invitations to special events with personalized citations to give as recognitions. And, of course, continue giving the usual plaques for special service.

10. Evaluate Board Members.

It's vital to evaluate board members' performance and give constructive feedback. To do so, you must first have clear expectations in place. Recruit board members with a job description explaining what you expect of them, including:

- amount of money you expect them to raise or contribute each year
- number of hours you expect them to work for your organization
- number of board meetings they must attend
- time you expect them to spend spreading the organization's story.

Once a year, have a nominating committee review each board member's performance. Have board members who don't fulfill

expectations meet with the nominating committee. They will usually offer to do better or to resign. If necessary, be willing to accept resignations and move on. ■

Resources

Eadie, Douglas C., "Boards Can't Go It Alone: How to Forge the Board-Executive Partnership," *Nonprofit World*, Vol. 14, No. 2.

Jenson, Donna, "Sharing the Vision:

Every Leader's Obligation," *Nonprofit World*, Vol. 8, No. 5.

Lauer, Larry D., "How Well Does Your Board Communicate?," *Nonprofit World*, Vol. 15, No. 2.

Vogt, Jean, "Demystifying the Mission Statement," *Nonprofit World*, Vol. 12, No. 1.

These publications are available through the Society's Resource Center, www.snpo.org.

Larry D. Lauer is the author of Communication Power: Energizing Your Nonprofit Organization (Aspen Publishers), from which this article is adapted.

Rate Your Communication with Your Board

For each question, give yourself a score from 1 to 10 (with 10 being perfect):

- ___ Do you review mission and vision statements periodically with your board to keep everyone operating on the same page?
- ___ Do you have a special policy book for board members which clearly explains management principles for all areas of the organization? Does this book explain the role you expect board members to play? Does it include a communications policy?
- ___ Do you recruit board members with a job description spelling out expectations? Does the nominating committee use those job descriptions to evaluate board members at least once a year?
- ___ Do you make a special effort to forge a good relationship with your board chair?
- ___ Do you maintain support throughout the board by keeping all board members well-informed of what's going on?
- ___ Do you work with the board chair to develop simplified board meeting agendas and materials? Is the board format simple, keeping information to what's essential?
- ___ Do you prepare a special financial report for the board which tells them only what they need to know in a clear, simple format?
- ___ Do you hold regular board activities, such as parties or informal gatherings at which board members can socialize and get to know one another?
- ___ Does your communication program include a variety of initiatives to keep board members informed, motivated, and committed?
- ___ Do you send board members a newsletter or executive memo every few months, updating them on the organization's activities?
- ___ Do you make sure the board is active in fundraising and marketing?
- ___ Do you recognize all board members often? Do you give tokens of appreciation at least once a year in addition to other recognitions for special achievements?

Score: 120-100 = A; 99-79 = B; 78-59 = C; 58-39 = D; 38-0 = F.