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## Ongoing Board Education:

### *Ensuring Board Members Have the Knowledge They Need*

by *Hildy Gottlieb*

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Given the increased scrutiny voluntary organizations find themselves facing these days, the issue of ongoing board training / education has become a more frequent topic for calls to the Help 4 NonProfits office.

The hardest question we have found boards facing when it comes to this issue is not what the program should include, or even how to afford training, but the one we call the "lead-the-horse-to-water" question. It sounds like this:

"My board does not think they need training, and I know they are not doing what a board should do. How can we get them the training they need, when they don't think they need it?"

Last week alone we received 2 almost identical lead-the-horse-to-water inquiries. The juxtaposition of those two calls was stark:

One of the calls was from an Executive Director. The other was from a Board Member.

One board was in one of the most sophisticated cities in the world. That board was comprised of professionals who were actively engaged with the organization.

The other group was in a small rural community of less than 100,000 people, where the board assumed its role was to approve whatever the director suggested and to otherwise stay out of the way.

Here are two boards from completely different parts of the globe, with completely different missions, different levels of professional sophistication and different attitudes about what it means to be a board, with calls coming from different ends of the spectrum - from an ED and from a fellow board member. Yet both have the same problem:

1) Neither board understands that its role is dictated by the simple fact that the board is at the top of the organizational chart. Neither board understands that that means ultimate accountability for everything that happens within the organization. Neither board understands what they are accountable for, whom they are accountable to, nor how to "do" the job of being accountable. ***In other words, neither board understands what its job must be.***

2) In both cases, however, board members have strongly held ideas of what being a board is all about, and in both cases, those board members are entirely incorrect. In one case, the board initiates exciting projects for its own board members to work on, paying little to no attention to the activities that are at the heart of what the organization is accountable for providing. In the other case, the board member who called had been lured to the board with the promise that "There is hardly any work, barely any meetings." ***Despite those inaccurate perceptions, both boards believe they are doing exactly what they are supposed to be doing.***

3) The result for both boards is that ***neither group thinks it needs training. They simply do not know what they do not know.***

In both cases, the people who called asked if we would provide a one-day training for their board members. And in both cases, we said, "No." We know from our early days in this work that when we are brought in as trainers for a board that does not think it needs training, the short term result is bad attendance for the training itself, and the long term result is - well - there is no long term result! And so, many years ago, we stopped doing work for boards who are not eager, excited, energized to learn to be incredible.

What we have focused on instead is exactly that - getting those boards eager, excited, and energized to learn what it really means to govern for incredible results in the community. By creating an ongoing education program to ensure your board knows what it is accountable for, whom it is accountable to, and most importantly, how to "do" accountability - your board will not only be leading itself to the water, but taking that big drink on its own.

### **Strategies: Leading the Horse to Want to Drink**

The following are strategies we have used with boards over the years, to get past the resistance to the ongoing education that must be part of what it means to be a board. All these approaches will accomplish the following:

1) These approaches are incremental, bringing board members slowly along a continuum of ongoing learning, starting with one narrow area at a time. These strategies all make the assumption that while your board may not think it needs an overall board education program, that board members are likely to agree there are at least one or two areas in which they could improve. These strategies therefore begin at the beginning, with those narrowly defined areas, learning by nibbles.

2) Moving onward from that narrowly defined starting point, these strategies aim at creating the desire to learn within the board itself, rather than having "training" foisted upon them. These approaches are intended to entice your board to want to learn more, generating curiosity and discussion.

3) All these approaches can work without any outside assistance - they are intended to be tools your board can use to create its own ongoing board education program.

In some cases, after using these approaches for a while, your board may feel it wants an outsider to help facilitate additional discussion, or to provide insights about a specific topic. That topic could be narrowly defined, or it could be as broad as "What does it mean to be an accountable, Community-Driven board?"

By that time, however, you will notice something has changed - the suggestion to bring in a trainer or facilitator will be coming from your board itself. The board will have led itself to want to drink, and will have begun taking initial sips on its own. And that is what these approaches are all about.

#### **First, a Warning:**

The following are ***not*** quick fixes. Because these approaches all focus on debunking the board's preconceived notions about what it means to do its job, and further because these are all intended to provide tools your board can use to begin its ongoing education program on its own, ***none*** of these approaches will work quickly.

But as most people know about effective education, the words "fast" and "learning" do not typically go together. A hit-and-run board training will have far less residual impact than the drip-drip-drip of gradual learning, allowing small bits of information to sink in over time to actually change the way that person thinks. And that is the intent of these strategies - to enhance not only your board's overall knowledge, but to change your board's attitude about gaining that knowledge. The first step in learning something new

is to acknowledge that we may not know what we think we know - to realize how much we really do have to learn. To bring your board from complacent to curious about what it really takes to govern and lead your organization is not something that will happen quickly.

That said, here are some strategies to insert ongoing education into the culture of your board:

### **Strategy #1: The Board Quiz**

One of the most frequently referred pages at the Help 4 NonProfits site is our Board Quiz. We have used this quiz, and similar quizzes, to begin discussions about the need for education when we have worked with reluctant boards.

 [CLICK to Board Quiz](#)

We once worked with a board whose members would tell anyone who would listen that this was the best board in town. And while that board did, in fact, have many prominent local personalities as board members, in truth it was one of the most ineffective boards we have ever worked with!

We therefore worked with the Executive Director to develop a quiz for the board, using our Board Quiz as a baseline. In addition to the quiz questions you will find at the link, we added specific questions for that organization. And as we wrote the questions, we shook our heads, knowing how the board would fare.

As background, the board had approximately 25 board members. Its annual budget was approximately \$15 million, and there were 80 employees. While not a huge organization, this was not a mom-and-pop operation by any means. Here are some of the questions we added to our standard quiz:

- What is the total budget for the organization this fiscal year (within 25%)?
- Name 3 programs the organization runs
- Name 3 program managers, aside from the Executive Director
- Name the 3 largest sources of funds for the organization

Virtually none of those board members could answer any of the Quiz questions, including those basic organization-specific questions. And some of those board members had been on the board for over 10 years!

The mere act of taking the quiz was a learning experience for this board. Grown adults, many of them powerful community leaders, were suddenly acting like 4th graders, trying to cheat off each other's papers. By the time they were done, no one had to tell them what they didn't know - they figured it out pretty quickly on their own.

Now they were ready to learn.

The strategy, therefore, is to ask the Agenda Committee to add a 15 minute item at your next board meeting, to have your board take the quiz, and to discuss the results afterwards. Again, depending on your organization, you may want to add some specific questions you believe the board should know, and fear they do not know.

From the discussion that arises after board members have taken the quiz, ask the board

- a) What do you want to learn?
- b) In what order?

From there, you will have a jumpstart on creating your board's education program, as you will have already addressed the most important question: What should we learn about? More importantly, the answer to that question will have come from the board itself.

The next step is easy - decide to take 15 minutes at each of your upcoming board meetings, to discuss one of those topics. The Board Accountability Committee (the

committee charged with ensuring the board has everything it needs to stay consciously accountable) or the Governance Committee or the Board Development Committee can be the ones in charge of finding information to share (more about that below), or you can assign topics to those who are interested, to find information to generate discussion at those 15 minute sessions.

The key, however, is that the impetus for that learning will have come from the board.

### **Strategy #2: Approaching Board Orientation as Just One Piece of Ongoing Board Education**

If your board has an annual orientation, whether this session is intended just for new board members or for the board as a whole, preparation for that session provides another opportunity to springboard your board into an ongoing education program. (Portions of the following suggestions come from our Board Recruitment and Orientation manual [CLICK](#) )

First, the word "orientation" suggests this is only for new board members. In fact, every member of the board should go through that intensive training, every year. The reason for this twofold: First, every board member can use a reminder course for issues that arise throughout the year. Second, though, there are always new items that come up, that the whole board should be knowledgeable about.

Therefore, as you prepare for that orientation program, include the whole board in determining, "What do we think is important to know?"

This is a different approach than most boards are used to. And in truth, part of the reason boards have become disengaged from ongoing learning is that they typically delegate that learning to their employee - the Executive Director - leaving it entirely to his/her discretion to determine what the board needs to know to do the job. When the board is actively involved in determining the contents of its own orientation program, you will find there is far more interest from those board members about what they need to learn. And you will further find there is far more interest in having all board members attend!

Therefore, if the time for your annual orientation is approaching, take 15 minutes at your next board meeting, and ask board members to help develop the board's upcoming orientation program. Have the board brainstorm answers to the following questions:

- What do you wish you had known when you started on the board, to help you make more informed decisions?
- What information do you feel you are lacking, even now?

In addition, have the Executive Director answer:

- What areas of the organization do you feel the board doesn't understand well enough to make informed decisions?

From this brainstormed list, 2 types of topics will arise. The first type will make sense for the typical intensive 3 hour orientation many boards are used to. Those topics might include a tour of the facility, or an overview of the organization's programs, or whatever your board feels is logical for that intensive few-hour session.

However, there will also be suggested topics that might be better covered in small bits throughout the year. As an example, ongoing financial education, to ensure all board members understand the financial matters facing the organization, might be best understood in small chunks. Rather than cramming those more complex topics into a single orientation session, the board can plan to add 15 minutes or ½ hour to each board meeting, to start your board's ongoing education program with topics board members themselves have said they want to learn.

### **Strategy #3: Discussion of Articles About Being a Board**

Many of our subscribers have shared with us an approach they have used to generate interest in creating an ongoing education program. And that is to use the articles in the Help 4 NonProfits Library as a first step in that process. Like the Board Quiz, these

enterprising individuals printed out an article, asked for 15 minutes on the agenda, and asked the board to read the article and talk about it.

If your board is not inclined to even brainstorm about what they want to know by using either Strategy #1 or #2, this approach may be a good one for your board to take. Review the articles in the library, and choose one that is directly related to the issues your board is facing. Take 15 minutes at your next board meeting, to read and discuss that article.

[CLICK to the Help 4 NonProfits Library](#)

Some of the articles we have been told have been helpful in this area are

- Governing for What Matters
- Why Boards Micromanage (and How to Get Them to Stop)
- Boards and Financial Knowledge (The Dirty Secret of NonProfit Boards)
- Ten Stop Signs on the Road to Board Recruitment (this article alone could keep your board's discussions lively for a whole year!)

We have been surprised at the number of board members and executive directors who have told us they send one of our articles to the board each month, as part of the agenda materials to be read prior to that meeting. Then they make sure the agenda includes 15-20 minutes to talk about that article and how it might apply to their situation: What might we do differently because of what we have read and discussed?

Again, this is a non-threatening way to insert ongoing education at each of your board's meetings. From those discussions, it will become apparent what areas your board needs work on, whether that is overall "What is a board?" or some more narrowly-defined topics.

By making board education part of every meeting, you are simultaneously teaching what the board needs to know and strengthening the culture of the board. This is a great approach, therefore, not just for starting out, but for ongoing use all the time!

You will find additional resources for generating discussion at the Resource Page for this article. [CLICK](#)

#### **Strategy #4: Audio Classes**

Once your board has determined what it wants to learn, and once board members have been discussing issues related to what it means to be a board, another piece that can give that education some punch is the use of recorded classes. These classes might be anywhere from 20 minutes to 2 hours in length. Board members can listen together as a group, or as individuals, listening on their own and bringing discussion back to the next board meeting.

We recommend, if possible, that board members listen together, discussing as they go, and learning at their own pace. Simply by hitting the "stop" and "start" buttons, discussion can happen as thoughts arise. Obviously if that is not possible, having board members listen on their own is the next best thing, as long as discussion occurs at the next board meeting.

Resources for recorded classes to be used for this purpose are available at the Resource Page for this article. [CLICK](#)

This approach to ongoing learning is an adjunct to the other strategies suggested above. For a board just putting its toes in the water of ongoing education, a recorded class may be a great first step, to jump start the board's thinking. After the class, the board might entertain a discussion of, "What else do we need to know?" as suggested in some of the other strategies.

On the other hand, this approach may be too advanced for some boards who are at the very beginning stages of board education. Knowing your board, you will know which approaches will work best.

## Conclusion

Board training and ongoing education does not have to be costly. And for the board who doesn't think it needs training, those costly approaches become just one more reason not to get the ongoing education they need. These first steps towards creating a spirit of ongoing learning at your organization will be a great start for putting your board on the right path.

These days, with the increased scrutiny towards the voluntary sector from governments around the world, many boards are heading into board education out of fear. And it is true that the board who does not know what it doesn't know is indeed walking in a minefield. That is because your board is accountable, whether board members are acting accountably or not - the buck stops with the board. If your board does not understand that, or only vaguely understands it, that minefield is just waiting for someone to make the wrong step.

But fear of that minefield is not the best reason to add those 15 minutes to your meetings. The best reason is that you will soon find those are the most energizing 15 minutes of your whole meeting - the part of the meeting folks are still talking about, long after the meeting is over. The discussions that arise will be about the most critical parts of your mission, the most critical parts of what it means to be a board. And while it sounds like one of those "work from home" spam messages, this one is true: Just 15 minutes per month can set your board on the road to being amazing.

Like they say in the commercials, "You've got nothing to lose, and so much to gain - Act Now!"



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