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## ENGAGED MODEL OF BOARD ORIENTATION

Santo Marabella, Moravian College

*At the core of a successful not-for-profit organization (NFP) must be an effective board of directors. A reasonable approach to building a more effective board includes ensuring the board has a high level of participation among its members and that the focus of their participation is concentrated on governance. It is not a new notion that board orientation programs can create a climate that facilitates high board participation that is focused on governance; however, in this article, I offer what may be a new vision for developing and managing board orientation programs. The proposed model includes NFP-specific and general board training content that one would expect to find in an orientation program for new board members. In addition, it includes three factors which may make it distinct: 1) teaching a board member shared beliefs or "truths" that can enhance their perceived ability to govern; 2) creating a dialogue through which a board member can articulate his or her perceived needs and obstacles to fully participate; and, 3) implementing a process for the NFP to be responsive to board member needs and obstacles so board participation increases. The research study presented in this paper tests the efficacy of the proposed orientation model. The results are discussed and implications for best practices for NFPs are suggested.*

### INTRODUCTION

The CEO and other key professional staff of a not-for-profit organization (NFP) are well aware that at the core of a successful NFP must be an effective board of directors - it is the best way for an NFP to do good (advance its mission) by doing well (effectively oriented new board members). Good rapport between board and the chief staff person; clearly communicated expectations of board members; and, responding to board member needs are all reasonable approaches to building a more effective board. The approach on which this discussion is focused is ensuring the board has a high level of participation among its members and that the focus of their participation is concentrated on governance. NFPs hope that board orientation programs create a climate that facilitates high board participation that is focused on governance.

Based on twenty years of NFP research and consulting, I believe that even though CEOs and NFP board members know board orientation is the right thing to do, very few boards do it or do it well. Though my data to back up this assertion is largely anecdotal, it may still be instructive. My sense about why this may be the case is based on the following assumption: NFPs are generally over-extended, understaffed and in desperate need of resources; and, they are typically preoccupied and singularly focused on their needs. My sense of what likely happens all too frequently is:

The NFP's inclination with a new board member is "What's the fastest and easiest way to get you working up to speed?" Frequently, the response is to invest minimal energy and attention in assimilating the individual into the NFP's board as quickly and simply as possible. This is usually accomplished by communicating NFP's mission, emphasizing financial and legal responsibilities, distributing documents (i.e. plans, bylaws, etc.), introducing the new board member to staff and board leadership, assigning the board member to a committee(s) and saying, "Thanks for joining, now let's get to work." NFPs seem to avoid anything that slows down or complicates this rote and standardized process because that

would only get in the way of doing all the work that needs to be done. Right? Unfortunately, it could not be more wrong!

This article builds on what I learned from prior research about why board members participate and what enables them to govern, and offers what may be a new vision for managing board orientation programs - hopefully, one that will entice more organizations to conduct orientations for their new members. The engaged model includes NFP-specific and general board training content that one would expect to find in an orientation program for new board members. In addition, it includes three factors which make it distinct: 1) teaching a board member shared beliefs or "truths" that can enhance their perceived ability to govern; 2) creating a dialogue through which a board member can articulate his or her perceived needs and obstacles to fully participate; and, 3) implementing a process for the NFP to be responsive to board member needs and obstacles so board participation increases.

Engaged represents the anticipated outcomes of a careful and complete implementation of a board orientation process. I believe that when new board members are engaged...

- E:** They are educated about board service
- N:** The NFP is responsive to their board service needs
- G:** Their ability to Govern is enabled
- A:** Serving on your board is more appealing to all board members (current & prospective)
- G:** Goals are more attainable because the collective competence of the board is enriched
- E:** Their high participation creates positive board energy
- D:** Productive dialogue between board and chief staff, and among the board, is a constant

But, do not misconstrue the above to mean the model is a quick-fix. The engaged model is anything but simple or quick. However, properly implemented, it has the potential to orient and develop board members effectively. Engaged is a model for acclimating and engaging individuals who have agreed to serve on the boards of directors of NFPs. The components of the model (E, N, etc.) represent outcomes of a process, more

than they do the steps in the process. The strategies that comprise the model are listed below and will be discussed throughout the remainder of this discussion: embrace governance-centered participation; understand some shared beliefs or "truths" about board member service; experience those "truths" translated into meaningful board member training; partake in regular dialogue with the CEO and other board members; believe that the NFP is responsive to board member needs.

### Governance-Centered Participation

Research I conducted in the past (Marabella, 1991) showed that participation on boards of directors increases when a board member feels able to govern, which is the central focus of their "job" as a board member. I discovered that a board member's ability to govern is enabled or enhanced when she or he:

- Is familiar and understands the NFP's vision, mission, goals and objectives
- Understands the NFP's expectations of them in his or her role as a board member
- Understands their responsibilities as a member of this board
- Believes that the board has a positive and productive working relationship with the Chief Executive (primary paid staff person)
- Feels that board members get along with one another and are able to work together effectively
- Feels that the NFP is responsive to their perceived needs and costs/obstacles of board participation

In addition, I was able to show that when an NFP addresses these factors, especially reducing or eliminating perceived costs of board member participation, the organization enhances a board member's perception of their ability to govern and is likely to result in higher board participation, particularly among new and less experienced board members.

### Dimensions of Board Service

In a previously published article (Marabella, 1994), I outlined a categorized list of activities of board service that are important to know for persons preparing for board service. They are:

- Staff-Related Activities - appoint and support a chief staff officer or executive director; monitor the ED's performance
- Strategic Planning Activities - clarify the NFP's mission; determine its goals and objectives; develop or approve strategic plans or policies to achieve goals and objectives; preserve institutional independence
- Program Activities - develop programs and plans to implement the programs; monitor program operations
- Resource-Connecting Activities - identify and develop resources; allocate resources; insure financial solvency
- Accountability Activities - maintain legal, internal and

public accountability

- Assessment Activities - evaluate or assess the performance and effectiveness of the program, the board and the organization.

Today, these activities continue to represent the type of activities NFP board members perform. It would be helpful for this information to be shared with them as they prepare for board service. Building upon those activities, I propose the following four dimensions of board service: context, self-knowledge and awareness, interpersonal relations and competencies.

### Context

First, how a board member thinks about leadership is the lens through which board service is initially viewed. There are many conceptualizations of leaders - situational, transformational, facilitative, for example. Board members need to embrace a leadership perspective that works for them. In addition, a sense of the context of the community - usually defined by the geographical area or region served by the NFP - is also important for board members. What issues are most relevant to this community, what resources are most plentiful, and what role can they as well as the NFP represent and play in enhancing the quality of life in the community? Today, there are so many NFPs, and so few community resources (for supporting evidence, refer to the content presented in Truth #10 of the "Board Members Need to Know the Truths"). So, training the board member to help the NFP stay strategically focused on advancing its mission will enable the NFP to sustain itself in these times of competition and limited resources. (Relevant to accountability, program, assessment, and strategic planning activities.)

### Self-Knowledge and Awareness

Next, the qualities and nature of the individual determines how she or he will apply or implement the context. This dimension is comprised of the talents, shortcomings, biases, intentions, resources and personality of the individual board member. It is a critical aspect of board service for prospective board members to have insight about what they bring to the "board table." The more the individual board member knows, as well as the NFP, about what they bring, the more focused and useful that board member can be to the organization. For example, the self-aware banker who has been selected to serve as a member of a board for his or her financial expertise, may express a desire to use her or his selling expertise (a less obvious skill) to "call" on community business leaders for the NFP's funding appeal. (Relevant to resource-connecting and assessment activities.)

### Interpersonal Relations

How the individual board member relates to other people in the NFP describes the third dimension. Communication, power needs, rapport and sociability shape their interactions with the NFP's chief executive, as well as other board members.

Prospective board members need to be able to communicate and work with other board members and the CEO, especially those who may have different styles of accomplishing tasks. They need to know how to engage others in ways that encourages input and dialogue. (Relevant to staff-related and resource-connecting activities.)

### Competencies

The fourth dimension is the way the individual approaches the responsibility of the "job" of a board member; that is, how the board member governs. Specifically, these are decisions that set policy and direction, rather than actions that implement those decisions.

Governance is having and using the power, influence and control to perform the activities of the board of directors. It is the foundation of board service. Competencies and skills, then, are the concrete, practical "tools" that board members employ in conducting these activities successfully. It takes competent

board members to fire the non-performing executive director; to cut back or cut "out" the ineffective or un-successful program; to re-focus the NFP's mission when the current one no longer serves its constituents. (Relevant to strategic planning, staff-related and assessment activities.)

### Board Members Need to Know the "Truths"

In the previous section, I described board participation and what enables board members to govern. Here, I share how I see governance applied to NFP boards by proposing eleven shared beliefs or "truths" about board service. The dimensions presented above - context, self-knowledge & awareness, interpersonal relations, competencies - give structure to the "truths" identified and described in this section. They provide the framework for the education NFPs need to present to new and first-time board members, regardless of the board's structure, size, purpose and context. They are categorized by dimension and are listed in table 1 below.

**Table 1: "Truths" For New Not-For-Profit Board Members**

Dimensions	Truths
Context (#1, 2 & 3)	1. Board members need to have a deep sense of purpose for their board service and be true to their core values. <b>(Be authentic!)</b>
	2. Board members need to think, feel and act as a "servant" in order to lead on the board. <b>(Serve first!)</b>
	3. Acknowledging, embracing and leading change is inherent to board service in the 21 <sup>st</sup> century. <b>(Ready for change!)</b>
Self-knowledge & awareness (#4 & 5)	4. When board members acknowledge their personal motives and needs in serving the NFP, and the NFP attempts to be responsive to these needs, board member's level of participation will increase. <b>(Be honest about self-interests!)</b>
	5. The ethics and values board members bring to the board must not only be consistent with the organization, compliant with the law and accepted by the community, but they must honor the board member's character. <b>(Courage leadership!)</b>
Interpersonal relations (#6, 7 & 8)	6. The organization gives power, influence and authority to board members as a tool to accomplish the board's goals. Board members must facilitate a "delicate balance" in using these tools. <b>(Facilitate, don't dictate!)</b>
	7. Relationships in the NFP, as in business, which are built upon inclusiveness advance the organization's productivity and value. <b>(Celebrate differences!)</b>
	8. The most important relationships for board members are their relationship with the chief staff person, followed by their relationship with other board members. <b>(Make the ED the board's partner!)</b>
Competency (#9, 10 & 11)	9. The core responsibility of board members is to govern the affairs of the organization. <b>(Real-time governance!)</b>
	10. Board members must constantly and consistently balance what sometimes appear to be opposing needs to advance the organization's mission and to ensure the organization operates efficiently and effectively. <b>(Do good and manage well!)</b>
	11. There are three specific competencies related to the governance responsibility that board members are charged with performing: action planning, resource development, and, enhancing organization reputation. <b>(Plan, develop resources and promote the organization!)</b>

#### **Truth #1: Board members need to have a deep sense of purpose for their board service and be true to their core values. (Be authentic!)**

How an individual thinks about leaders and leadership sets the parameters for their leadership context and, in turn, establishes the framework for the way he or she will think and act as a board member. Not long ago leaders were icons set upon unapproachable pedestals. They were "leader-gods" who moved history forward almost single-handedly. Because we, the common people, were so detached and distanced from these leaders, we perceived their leadership as glamorous and exciting - the Hollywood leader!

And as the old adage goes, "all that glitters is not gold" - what we see of the Hollywood type leader is not necessarily what is. While charisma still has a place in conceptualizing leadership, it should not be the driving force. When that charisma is shrouding insincerity - and what the Hollywood leader *says* is important, is not reflected in what they do - it is difficult to get others to follow. Consequently, this type of

leader often has to rely on coercive power from their position to get things done.

Today's board members need to star in their own "reality show" - one in which they know why they are called to lead and honor the core values that bring them to serve. This is their authenticity, which Cashman (1998) described as the true voice of the leader as it touches other people's hearts. Such leaders inspire commitment and loyalty in others and are able to expand their influence, as well as their ability to affect change - all crucial to board service. Their authenticity, rather than their charisma, drives their leadership.

#### **Truth #2: Board members need to think, feel and act as a "servant" in order to lead on the board. (Serve first!)**

Is the priority to lead or to serve? For the "Hollywood leader," the focus was on leading, for today's NFP leader the focus needs to be on serving. In fact, Blanchard, Hybels & Hodges (1999) claim that "character in the form of a servant



heart" precedes leadership – that is, a leader must think, feel, and act as a "servant" in order to lead. Robert Greenleaf (1970) described the nature of the servant-leader best: It begins with the natural feeling that one wants to serve, to serve first. Then, conscious choice brings one to aspire to lead (p. 7).

He suggests that one who is leader first, may be looking to their leadership to fulfill a need for power or material possessions. While the servant-leader wants to help, make things better, or bring about change and is willing to lead in order for that to occur.

**Truth #3: Acknowledging, embracing and leading change is inherent to board service in the 21<sup>st</sup> century. (Ready for change!)**

The "old economy" was characterized by security and certainty. So, when confronted with change, NFPs, like their business counterparts, worked hard to manage it effectively, but only after they have first worked hard to resist it. Avoiding the termination of the ineffective CEO or denying the probable discontinuation of an established funding source were often unpleasant surprises that NFPs (not unlike their for-profit counterparts) may have wanted to avoid, even as they struggled through these situations.

Few would argue that the security and certainty of the old economy has given way to volatility and complexity, in both the not-for-profit and the business sectors. Foster and Kaplan's (2001) research in Creative Destruction hypothesize that during the next quarter century, no more than one third of today's major companies will survive in what they call an "economically important way." Their view, in much distilled terms, is that a company needs to find ways to continuously be honest about what no longer works. Obsolete or ineffective ways of doing business need to be abandoned (destroyed) so that the organization may reinvent (create) new businesses and work, even if this involves different or modified core competencies.

NFPs should learn from Foster and Kaplan that old ways of doing things - such as recruiting volunteers or raising funds, for example - may have to be abandoned and reinvented. NFPs need to consider change as an organization strategy, and always be ready to change and for change. For the NFP board member, that may mean: anticipating the CEO will eventually move on to a new opportunity in another organization; considering that the next CEO may be a working mom who requires schedule flexibility; and, coming to grips with our discomfort with another board member's work style that is different from our own.

**Truth #4: When board members acknowledge their personal motives and needs in serving the NFP, and the NFP attempts to be responsive to these needs, board members' level of participation will increase. (Be honest about self-interests!)**

Board members and volunteers have some self-interest motives even if it is to simply "feel good" about themselves for their efforts. This is a reasonable notion, albeit difficult for some to admit. The desire to expand social or professional

networks, learn a new skill, or find a refreshing diversion from one's job are all reasonable motives rooted in self-interest.

My study in 1991 revealed that NFPs need to help their board members identify all of the needs they would like to satisfy through their board service and be responsive to these needs. When NFPs do this, they enhance their board members' ability to govern. NFP leaders need to be honest about self-interests so that the organization can help them fulfill more of the needs that motivate them, and be better poised to govern.

**Truth #5: The ethics and values board members bring to the board must not only be consistent with the organization, compliant with the law and accepted by the community, but they must honor the board member's character. (Courage leadership!)**

Ethics and values have always been important because of the need to be accountable to donors, but in a post-Enron society, the ethical expectations for the NFP are higher than ever. Board members are expected, of course, to avoid conflicts of interest (real or perceived), use donated funds as intended, and accurately report the NFP's program outcomes.

However, what seems more critical to today's NFP leaders are situations which challenge them to choose between two or more ideals in which they deeply believe. An example is the deliberation of whether or not to serve on the board of a health institute that uses stem cell research to cure disease and the potential adverse impact it could have on his or her standing as a Roman Catholic. Both ideals - serving an organization that is doing good and preserving one's religious standing - are deeply held ideals.

These situations are defining moments (Badaracco, 1998; Bennis, 2000; Bennis & Thomas, 2002). They shape the way leaders think and make decisions, but first, they tell a lot about character and integrity. As we see from the example above, this process can be difficult as it may threaten one of our ideals while honoring the other. Board members have many "opportunities" to be courageous.

**Truth #6: The organization gives power, influence and authority to board members as a tool to accomplish the board's goals. Board members must facilitate a "delicate balance" in using these tools. (Facilitate, don't dictate!)**

The source of board members' power, influence and authority comes from what can be characterized as the "delicate balance" between the NFP board and staff (Houle, 1989; Kramer, 1965; Middleton, 1987; Taylor, 1987). The "delicate balance" acknowledges that board and staff need, and benefit from, each other.

At the crux of this balance is dynamic tension and healthy conflict. This tension and conflict emerge between the board and staff as each vies for their rightful power, influence and authority over the NFP. It is inherent, but not necessarily negative, to the board/staff relationship, and needs to be managed to maintain the "balance." Maintaining balance does not imply "equal" in the balance of power, influence and authority actually and constantly shifts between board and

staff, depending on the task or issue at hand.

I believe that board power, influence and authority typically include: make policy; hire, fire, supervise chief staff; and, commit the NFP's human or material resources and make decisions that have long-term (strategic) impact. On the other hand, staff is charged primarily to: implement policy; hire, fire and supervise other staff; and, commit the NFP's human or material resources and make decisions that have short-term (operational) impact. While this describes the primary "actors," a lot of give-and-take - and facilitation - is required to maintain the balance.

Few would argue that leadership today is more about facilitating people and their knowledge and ideas, and less about commanding and controlling the work and workers. When a board member facilitates, she is listening and searching for meaning, engaging others' participation and reflecting on how to meet their needs. Facilitation helps board members manage the delicate balance effectively, and is particularly helpful in working with the CEO of the NFP.

**Truth #7: Relationships in the NFP, as in business, which are built upon inclusiveness advance the organization's productivity and value. (Celebrate differences!)**

In the early 1980's, embracing diversity meant a company would "tolerate" individual differences, and perhaps even look to bring differences into the workplace. Today, we should be beyond "tolerance" in our journey to embrace individual differences. We should be excited and celebrate the wonderful things that human diversity brings to the organization (Cox, 1991) and the learning and growth realized from incorporating diversity into the organization (Thomas & Ely, 1996).

This is especially important for the NFP since many serve communities and clients where cultural diversity is ever-growing. Their boards need to be proactive and learn how these differences may help them become more "ready" for change (as discussed above) and more able to respond to the needs of the organization and its stakeholders. But mostly, celebrating diversity empowers organizations to reach their potential because it includes a cornucopia of perspectives and possibilities, making the pursuit of excellence all the more possible.

**Truth #8: The most important relationships for board members are their relationship with the chief staff person, followed by their relationship with other board members. (Make the ED the board's partner!)**

In business, good relationships can convert sales pitches into sales deals. While there is not always a traditional "product" to sell, relationships can make or break the flow of productivity in an NFP. Board members in my research (1991) reinforced this notion when they reported that the two items with the highest costs of their board participation were "how well board members got along with the executive director (ED)" and "how well board members got along with each other".

The relationship problems between board and staff vary. "Runaway EDs" who are too powerful or uncontrollable lead a board to become disinterested and passive; and, iron-fisted, inflexible or micro-managing boards can render the CEO inconsequential and handicap or drive a CEO away.

Today's board members need to view the CEO as their partner and make board/staff relations a priority. For example, setting organization policy is certainly the board's primary responsibility. However, the best organization policies - those which work well and are fully embraced - are ones in which the board collaborates with the CEO through dialogue, mutual respect, and reasonable compromise.

**Truth #9: The core responsibility of board members is to govern the affairs of the organization. (Real-time governance!)**

Governance is having and using the power, influence and authority to perform the board activities described in Universal Truth #6. Chait & Taylor (1989) stated unequivocally that trustees exist to govern the organization by keeping it "on a straight course for the long-term good" - monitoring quality and ensuring that the NFP fulfills its mission, not making day-to-day decisions.

Staying focused on governing, and not managing, is a challenge, especially when "otherwise intelligent individuals and astute business people often toss aside principles of good management and sometimes even common sense when they put on trustee hats" (Chait & Taylor, 1989, p. 44). Board members tend to micromanage personnel issues about staff other than the chief staff person and program issues related to daily coordination and implementation. Chait and Taylor cite one reasonable exception. In times of crisis or transition - fiscal or personnel - the board may need to "manage" the NFP, but only until it returns the NFP to "normalcy."

Today's board members must focus on the use of their power, influence and authority to govern (see Universal Truths #6 and 8 above). Maintaining this focus requires constant attention and support from the CEO, board chair and other board members. It means the board member has to be engaged in the NFP's affairs without managing its activities. Faithful attendance and participation in board meetings and committees is an important way to achieve real-time governance.

**Truth #10: Board members must constantly and consistently balance what sometimes appear to be opposing needs to advance the organization's mission and to ensure the organization operates efficiently and effectively. (Do good and manage well!)**

Do good or manage well? "Doing good" used to be enough. A poorly managed organization with a noble mission continued to receive funding and support because it was "doing good". But, the changing environment has created new rules.

Today, there are more NFPs and less money for them. According to data from the Independent Sector (2006), the total number of independent sector groups or charities (private and public charities, welfare and religious organizations) has

doubled since 1981 to a total of 1.5 million (1.9 if you count all not-for-profits), with more than 70% of them coming into existence over the last 30 years (Vogelsang, 1997). For about the same period (1987-2005), the growth of charities represents a rate that is triple to the growth rate of the business sector.

At the same time according to the 2004 and 2005 annual reports on philanthropy (Giving USA, 2006), total charitable giving reached an estimated \$248.52 billion, amounting to increases between four and nine percent among all sources of giving in 2004. In 2005, that figure increased to \$260.28 billion, a 6.1% increase. Natural disaster relief accounted for some of the increase (3% of the total), but even before that was included, 59% of organizations reported an increase in charitable revenue for 2005.

While this is generally good news, it is important to note two points. First, the 2004 Report showed that more than one-third of small NFPs (those with less than \$1 million in charitable giving) and forty percent of medium NFPs (with \$1 to 20 million in revenues) saw a decline in giving from the previous year (that is, 2003). This is particularly relevant as more than 98% of U.S. NFPs can be classified as "small" or "medium," according to Giving USA (2006). So, as the funding "pie" for small NFPs shrinks, there are fewer "slices" available for them. Second, while overall giving increased in 2005, giving for arts, culture and humanities, as well as health and international affairs, declined.

The 2005 Report found the highest percentage of organizations reporting a growth in charitable contributions and the lowest percentage reporting a decrease in giving since 2000. This may be a sign that a new trend of increased giving is emerging and a reason for optimism. However, the reality for NFPs will continue to be fierce competition for funding that begets a tenuous situation of "survival of the fittest." Only those NFPs who do good and manage well will, and should, survive.

It does not need to be one or the other. Peter F. Drucker (1989), recognized as the father of modern management, thought that the best NFPs are role-models for business in the areas of strategy and board effectiveness. He says they devote great thought to defining their organization's mission and developing actions (strategies) that can help attain that mission.

Drucker also believed that the most successful NFPs recognize that they need management more than business does, because there is no "bottom line" to guide their practices. He says that while they are still dedicated to "doing good," good intentions are no substitute for "organization and leadership, for accountability, performance, and results."

I like to refer to this as governing with a heart. It requires constant reinforcement of a mantra of unwavering and simultaneous commitment to the NFP's mission (heart) and the activities and priorities of operating the board (governance).

**Truth #11: There are three specific competencies related to the governance responsibility that board members are charged with performing: action planning; resource development; and, enhancing organization reputation. (Plan, develop resources, and promote the organization!)**

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If the activities that comprise governance include making policy and decisions that have long-term impact (as reported in Universal Truth #9), then, planning is a necessary competency of board members. With mission in mind, the planning process considers where the NFP is and where it wants to go, and, then, develops a series of steps or actions to take it there. Today, NFP board members need to focus more on strategic thinking than strategic planning. Strategic thinking produces a shared vision - a collective view of where the NFP wants to go - while strategic planning tends to produce binders of obsessive plans of "how to get there" that may become obsolete by the time they are completed.

According to the literature (Garber, 2007; Hunger & Wheelen, 2006; Klein, 2007; Li, Ching-Yick Tse & Yan Gu, 2007), the period of time covered by strategic plans has shrunk because of the fast pace of change, largely due to technology. [A notable but perhaps not surprising exception is the federal government which recommends a minimum of six years as a strategic planning window (OMB Circular #A-11, 2002.) Since planning "windows" of 10 and 20 years are no longer practical, more reasonable windows of 3 to 5 years require us to rethink the role of the strategic plan. In my role as a consultant, I have helped NFP clients' boards move toward producing mission-driven action plans, in lieu of strategic plans. Action plans are two to three page documents that reaffirm or revise the NFP's mission and vision; identify its strengths, weaknesses, opportunities and threats (SWOT), and, develop 3 or 4 goals, and their corresponding strategies, that can be achieved in a twelve month period.

In addition to planning, NFP board members are charged with the responsibility of generating the resources to sustain and grow the organization - one of the most critical roles a board member plays in perpetuating the NFP. Specifically, board members have three resource-related tasks: identify and develop all types of resources - human, material and financial - to support the NFP; allocate these resources; and, insure financial solvency of the NFP. The familiar phrase among fundraising circles in advising board members is "give, get or get off." This means board members need to give money (or resources), get resources for the NFP to use, or get off the board so that someone who can do the first two takes their place. Harsh but realistic, it underscores an important board member responsibility - "connecting" the NFP to the resources it needs.

My research, I affirmed that most board members expect to be asked to contribute financially to the NFP, but my more recent consulting experience tells me they do not want to be the ones to ask others for money. In working with the board of a theological seminary, I found that while board members understood their responsibilities in their upcoming capital campaign, 75% felt "uncomfortable" asking organizations and people they do not know, as well as professional contacts for money; and, to a lesser degree, asking their personal contacts (people they do know) for money. Whether it is a lack of fundraising skill or a simple disdain for (or fear of?) asking people for money, NFPs need to understand board members' difficulties and help them work through them.

The third major competency is the role board members play



in creating and maintaining the NFP's positive image and rapport with clients, funders and the community. This is essential to the resource development described above. Advertising and paid promotions are expensive; publicity from public service messages or newspaper articles is free but their value is difficult to predict.

Doing good is not enough to keep an NFP afloat. Today's board members are usually active, well-connected community leaders who need to be vocal and visible "ambassadors" for their NFPs and promote its mission, its needs, and ways the community can help it thrive.

## FROM TRUTHS TO TRAINING

### Background on Board Orientation

The "truths" I presented suggest that there is information that describes common and collective themes on service and governance in a not-for-profit board. Presenting these "truths" to board members may provide guidance about how to govern. In addition, as we have learned earlier in this discussion, when an NFP understands and is responsive to a board member's perceived needs and perceived costs or obstacles of participating, the board member feels better able to govern and participates more. I believe that orientation programs for new board members may be a useful vehicle for communicating this knowledge and commencing the process of integrating this board theory into governing practice. However, I also believe there is a need for a new vision of developing and managing board orientation, one that combines board training with NFP responsiveness.

As I stated at the beginning, I do not believe orientation is done well and regularly. A very cursory exploration of the literature demonstrates that there are researchers who agree (Bartlett and Grantham; 1980; Joseph, 1995; Kolzow, 1995; and, Herman & Renz, 2004). Perhaps, in addition to the perception that "orientation" slows things down in terms of getting new board members to work, it may also be that NFPs have not seen results from their current orientation efforts that lead to increased board member participation or more effective governance.

In the spirit of improving board orientation programs, I propose a model for effectively orientating new board members with three components: 1) teaching a board member shared beliefs or "truths" that can enhance their perceived ability to govern; 2) creating a dialogue through which a board member can articulate his or her perceived needs and perceived obstacles to fully participating; and, 3) implementing a process for the NFP to be responsive to the board member's perceived needs and obstacles to facilitate full participation on the board.

### Board Member Training

The board member training I propose as part of my orientation program model includes NFP-specific and general board training content that a seasoned CEO or board member might expect. Topics such as: organization mission, bylaws, structure, and strategy; financial & legal responsibilities of board members; and, ways for CEOs and board members to

work together effectively are among the most often included ((Bartlett & Grantham, 1980; Carver, 1990; Carver & Carver, 1996; Joseph, 1995; Kolzow, 1995; Taylor, Chait & Holland, 1996; Nobbie & Brudney, 2003; Totten & Orlikoff, 2003). The training component of the engaged model that I propose is grounded in the "truths" and uses a multi-faceted approach that has the following objectives:

- Present perspectives on board service to which a board member needs to be acculturated (i.e. governance is the *raison d'être* for board service)
- Disseminate vital information about the NFP that a board member needs to know (i.e. the NFP's mission statement)
- Be interactive so that the NFP begins to create an organizational environment that engages the new board member in dialogue which is conducive to governance (i.e. builds rapport between the CEO and board member)
- Introduce the roles, behaviors and competencies that are required to govern (i.e. developing a shared vision).

An outline of the curriculum for board member training is offered in appendix A.

### Creating Dialogue

Through my experience and research, I have observed that many orientation programs use a didactic approach that is characterized by one-way communication - that is, the CEO, board chair and/or other board members tell new board member about the NFP (e.g. mission, vision, etc.) and what is expected of them (e.g. make financial contributions). Dialogue, other than what occurs during a question-and-answer session, does not seem to be a significant component of orientation programs.

The engaged model suggests a process for orienting that occurs over months, rather than hours, giving more opportunities for dialogue to occur. In addition to the interactive nature of the training described above, it facilitates a dialogue with the board member around what he or she perceives to need from their participation or what creates obstacles to participating on the board. The board member is asked to consider and articulate what needs and obstacles it perceives may impact their board participation. For example, a board member may express that he needs to have a comfortable understanding of what specifically the NFP expects him to do as a board member. In the same token, another board member may fear that her employer will now become a target for constant solicitation for financial support, which may be uncomfortable and considered an obstacle to her participation.

### NFP Responsiveness

NFP responsiveness is the component of the model in which the NFP develops, implements and evaluates a plan to respond to the needs and obstacles that a board member perceives to exist (or may exist) as part of their board participation. Using the example described above, the NFP may put together a job description that is specific to the board member who wants to know exactly what is expected of him.



And, to respond to the perceived obstacle, the NFP may alert the Fundraising Committee Chair about the board member's concern and ask the Committee Chair to speak with her about what, if any, financial support for which she feels comfortable having her company solicited.

### Research on Board Orientation

In this section, I describe the research I conducted to develop and test the engaged model. The objectives, methods, results, discussion, implication for practice are presented.

### Objectives

The original research I conducted concluded:

- Attention to perceived needs and reducing or eliminating perceived costs of participation, among other factors, enhances a board member's perception of their ability to govern and is likely to result in higher board participation
- The more a younger (less tenured) and less experienced (1 or 2 boards) board member feels able to govern, the more the board member will participate.

The aim of this research on board orientation was to develop and test an intervention (my model for a board orientation program) that would bring about improvement in a board member's perceived ability to govern, and ultimately lead to an increase in their participation on the board. The study was conducted between January 2005 and January 2006.

### Methods

Here I describe the participants, hypotheses, measures and procedures.

### Participants

The primary participants in the study are sixteen board members from six NFPs [all 501(c)(3), IRS-exempt organizations] in the Greater Lehigh Valley, PA, region who are newly elected and new to the organization. The designation "newly elected" is defined as a board member who was elected to their respective board between July 2004 and December 2004; while "new to the organization" means the board member has never served on this board before. Though I chose not to control for "board experience," I will address the issue of experience by noting the percentage of board members who have never been on a board or have only served on one board and designating this as "less experience" (this is done to see if this study profile is consistent with the finding in my prior research that demonstrated higher board participation among new and less experienced board members).

A secondary, albeit important, group of participants is the CEOs of the six NFPs. They serve as the chief executive officers of the NFPs; have titles from "executive director" to "artistic director"; and, represent NFPs that provide service in the childcare, theatre, voluntarism, community center, and food distribution arenas.

### Hypotheses

There are two major hypotheses for this research:

**Hypothesis 1:** There will be improvement, as reported by board members and measured by a higher governance quotient and a higher participation level, from Time 1 to Time 2. (Time 1 is before the board member participated in the engage model and Time 2 is the period following the third board meeting that the board member attended.)

**Hypothesis 2:** There will be improvement, as reported by CEOs and measured by a higher participation level, from Time 1 to Time 2.

### Measures

In the study, there are three outcome measures. They are: the governance quotient, board member participation (self-reported) and board member participation (CEO reported). All three measures were extracted from a questionnaire that contained six summated scales which I developed previously and in which instrument reliability and validity was addressed (Marabella, 1991).

Governance Quotient, the first measure, contains nine items. Three items address understanding NFP mission and goals; two items address board roles and responsibilities; two items address board member relationships; and, the final two items address the NFP's responsiveness to the board member's needs. Together, they measure the board member's perception of their ability to govern.

The range of responses is strongly agree, agree, disagree, strongly disagree, and not applicable. The Governance Quotient assessment can be found in appendix B.

The second and third measures are two versions of the Participation Assessment. Each Participation Assessment contains the same seven items. The first two items address meeting and event attendance; the third addresses assistance with programs and events; committee or project involvement is the fourth item, while leadership on committees or projects constitutes the fifth item; financial support constitutes the sixth item; and, time contributed is the seventh item. Together, they measure the board member's perception of their board participation.

The range of responses is Low - 1 or 2, Average - 3, High - 4 or 5, Not Applicable. I developed two versions of this Assessment - one, a self-report to be completed by the board member; the other to be completed by the CEO. The Participation Assessments - Self and CEO are found in appendix C and appendix D, respectively.

### Procedures

The procedures I followed to test the model's effectiveness were:

1. Conducted an Introductory Session for CEOs of the NFPs whose board members would be participating in the

research (the actual board members - the study subjects - did not participate in this Introductory Session). The agenda was: review the research study purpose and goals, expectations I had of participants, Governance Quotient and Participation Assessment - Self & CEO forms.

2. Obtained demographic information from the board member participants. Two types of information were sought: data to ensure that a board member met the "newly elected" criterion; and, data to document their level of prior board experience (as reported above, the majority of board members had little to no prior board experience).
3. Administered the Governance Quotient and Participation Assessment - Self to the board member participants, and the Participation Assessment - CEO to the CEO participants as a pre-test to determine baseline levels of perceived ability to govern and board participation.
4. Conducted two hour New Board Member Training Sessions that each board member participant attended, along with their CEO and board chair. The NFP representatives provided NFP-specific content for their board members during the sessions. It should be noted that for some members, their attendance at this session preceded their attendance at a board meeting, but due to the sporadic schedule in which new board members are brought in, it was not possible to standardize this for all board member participants.
5. Assisted the CEOs in developing and implementing a plan for the NFP to respond to the "needs and obstacles" communicated to me by the new board members.
6. Following the board member's attendance at her or his third board meeting, I administered the Governance Quotient and Participation Assessment - Self to the board member participants, and the Participation Assessment - CEO to the CEO participants as a post-test to determine if levels of perceived ability to govern and board participation were impacted by the intervention (orientation model).
7. Conducted a Feedback Session for CEOs and board member participants to gain their insights and evaluation about the research.
8. One year later, I re-administered the Governance Quotient and Participation Assessment (Self and CEO) to ascertain what are the long-term levels of perceived ability to govern and board participation. I assessed the new board member's perception and awareness of the challenges and strengths facing their respective NFP and board through the development of a new instrument. (Note: there was no opportunity to address the later part of Item #8 - assess perceptions of challenges and strengths, etc.)

## RESULTS

### Background on NFPs

Six of the six NFPs that participated in the study report they have been conducting orientation for new board members, prior to participating in this study. Most described their orientation process as "informal" and having the purpose of helping new

members understand the NFP's mission, needs and financial picture; roles & responsibilities of board members; and, ways for board members to support the mission.

For most of the NFPs who participated in this study, the orientation they hold is a one-session, one-hour program designed to be administered to individual board members (rather than as a group of new members) and conducted at a variety of times - prior to election to the board, at the time of the first meeting, after the first meeting and during the first month of board membership. However, half of the NFPs participating in this study conduct an orientation prior to the individual's first meeting as a board member.

At the session, new board members meet chief board and staff leaders, hear presentations from NFP board and/or staff, observe a board meeting or event, receive a board manual or handbook and have an opportunity to tour the headquarters and/or facilities. The content of the session agenda - formatted as an interactive presentation - is an overview on the NFP's vision, programs and activities; a review of the organization's financial picture; an explanation of the board member's role and responsibilities, specifically as they relate to fundraising and publicity for the NFP.

There is little to no evaluation done to assess if the orientation meets its objectives. Some NFPs do administer a survey to the new board member to elicit their feedback about the orientation (i.e. Did you enjoy the orientation?), while other's gauge its effectiveness on the board member's "enthusiasm" and response.

### Sample Size

Initial sample size was sixteen individuals from six different NFP boards. Two individuals resigned from their respective boards due to professional obligations such as relocation and increased responsibilities at work. Total sample size became fourteen - eight women and six men. Of the fourteen participants, 8 (57%) are less experienced - that is, they have either never served on a board or have served on only one other board. All participants fit the designation of "newly elected" and "new to the organization" as defined in the Methods section of this article. Both factors - less experience and new members - are consistent with the results of my earlier research.

For the participation measurement component of hypothesis testing (H1 & H2), the sample size was reduced to 10 because individuals who reported "Not Applicable" for all variables of a participation measure (i.e. meeting attendance) were not included. I felt that including their data would favorably distort the participation baseline (they could be considered more "new" to the board since they had absolutely no participation). For the governance measurement component of hypothesis testing (H1), the sample size remained at 14.

### Measures

Cronbach's alpha (1951) was conducted to ensure internal reliability for the above three measures. There was high internal consistency (almost all were in the .90's; two or three were in the mid .80's); plus, as these measures were developed

from previous research (Marabelli, 1991), instrument reliability and validity was addressed.

## Hypothesis Testing

Below is the results of testing the study's two hypotheses.

**Hypothesis 1:** There will be improvement, as reported by board members and measured by a higher governance quotient and a higher participation level,

**Table 2: Hypothesis 1 Testing**

	$\bar{X}$ Pre	$\bar{X}$ Post	N	t value	Significance
Participation	13.90	22.30	10	2.78	p = .022
Governance	17.00	29.86	14	4.34	p = .001

A ten-question quiz directly related to the content of the training was administered to all subjects following the training as a manipulation check of the intervention's training component. The mean average for all subjects of 83 (100 point scale) demonstrates that an acceptable level of knowledge was attained as a result of the training. This supports the assertion that the intervention - comprised of the training and NFP responsiveness components - was responsible for statistically significant improvement in a board member's perceived ability to govern (GQ).

NFP Responsiveness was monitored. CEOs were given information about each of their board member's perceived needs and costs of participation. The CEOs were asked to develop a plan for each participating board member that responded to the concerns expressed. They submitted a report on their plan, as well as a subsequent report indicating the actions they took to implement the plan. In all cases, the plans were implemented as stated.

**Table 3: Hypothesis 1 Correlation**

	Correlation Coefficient	N	Significance
Participation Governance	R = .80	10	p = .006

**Hypothesis 2:** There will be improvement, as reported by CEOs and measured by a higher participation level, from Time 1 to Time 2.

This hypothesis was not supported. While the t-test comparison indicated the means moved in a positive direction

from Time 1 to Time 2.

This hypothesis was fully supported. The paired t-test comparison indicated statistically significant improvement in the Participation measurement [mean average increased from 13.90 (T1) to 22.30 (T2), where p = .022 and N = 10]. The data for the Governance measurement also indicated significant improvement [mean average increased from 17.00 (T1) to 29.86 (T2), where p = .001 and N = 14]. Results are listed in table 2 below:

As a follow-up to learn more about the relationship between improved GQ and participation, I looked at the correlation between the amount of change in participation and the amount of change in GQ. The analysis indicated that the more GQ increased, the greater the subsequent participation increased [using N = 10, r = .80, where p = .006]. What was found is that those who were most favorably impacted by the intervention, also had the highest improvement in their participation. And, conversely, the subjects for whom the intervention had the least impact, participation did not improve or it decreased. Since causality cannot be concluded from this correlation, it is possible that greater participation led to greater GQ - essentially (i.e. on the job training); however, prior research that I conducted (Marabelli, 1991) did demonstrate the converse - that is, that participation on boards of directors increases when a board member feels able to govern. This may say more about commitment to board service than anything, but that is beyond the scope of this study. See table 3 below:

**Table 4: Hypothesis 2 Testing**

	$\bar{X}$ Pre	$\bar{X}$ Post	N	t value	Significance
CEO Participation	23.60	25.9	10	0.94	p > .05

One year after the initial study, I did re-administer the assessments to the participating board members and CEOs: the Participation Assessment was again administered to both the board members and the CEOs; the Governance Quotient was re-administered to the board members. I was looking for

improvement in levels of participation - as measured by the board member and CEO - and in the board member's perception of their ability to govern since the last time these variables were measured (Time 2).

The data resulting from the one-year follow-up did

demonstrate improvement from the post-test scores (Time 2), as well as the pre-test (initial scores at Time 1). Unfortunately, the results were not strong enough to yield statistical significance. If more data had been available (i.e. more board members responded to the follow-up), it could have strengthened the results and perhaps shown that the improvements one year later were most likely related to the experience board members had with the engaged model.

## DISCUSSION

### Findings

The study has two significant findings. First, the intervention – the model for new board member orientation – positively and significantly impacted a board member's perception of their ability to govern and perceived participation. Second, there is a significant and consistent “disconnect” between what a board member perceives about their own participation and what a CEO perceives about that board member's participation.

### Methods

Using pre and post tests was preferred because it enabled me to test the same subjects. A way to strengthen the design may have been to add a control group. The board members in the control group would have completed the pre and post-tests, but would not have participated in the engaged model that I developed. This consideration was eliminated to avoid jeopardizing the entire study as the control group idea was met with some resistance from the CEOs who wanted each of their new board members to “benefit” from the intervention. One reasonable way to counter the negative effects of not having a control group would be to administer the Governance Quotient and Participation Assessments: Self & CEO to former or current board members who did not receive the intervention. I would consider this in future testing of the model.

The sample size is very small, but inferential statistics does account for this. Statistical significance becomes more difficult to demonstrate the smaller the sample size.

### NFP Orientation Programs

NFPs participating in this study report that they conduct an orientation for their new members with aims, design and content that mirror what I have discovered in the literature. However, a common omission among all orientations – which characterizes the distinctiveness of the model I propose – are the following components: orientations sessions are described as a portion of a day, rather than a process over a period of months; none of the orientations conducted by the NFPs who participated in my study elicit the new board member's needs and expectations or creates an opportunity for the NFP to be responsive to those needs; very little attention is given by these orientation programs to evaluating their effectiveness.

### Obstacles to Orientation

My experience from this study, along with my review of the literature, suggests obstacles (i.e. takes too much time, difficult

to get board members to comply) exist that prevent NFPs from investing enough resources to conduct a board orientation process such as the model tested. Further research could lead to understanding these obstacles and developing strategies that would make it easier for more NFPs to implement better board orientation programs.

### CEO and Board Member “Disconnect”

I found that CEOs and board members do not share the same perceptions about the board member's participation. This is similar to a finding by Nobbie & Brudney (2003) who found board members perceived stronger board performance than CEOs or board chairs. Further research would help understand how these, and other, perceptual differences impact a board or NFP's productivity or performance.

### Implications for Practice

There are three major implications for practice:

1. Orientation programs for new and less experienced board members enhance their perceived ability to govern and their perceived participation. This can lead to more effective boards of directors and ultimately more effective NFPs.
2. The investment by the CEO and board president is substantial and front-loaded (first year), requiring the NFP to spend significant effort and energy in new board members before they have contributed much “return” (i.e. assistance or help) to the organization. I believe that, much like the for-profit sector, there will be a greater payoff for the NFP in the longer-term as a result. Also, it is likely that the investment will plateau after the first year. This is not to say that the NFP will not need to pay attention to the board member's needs, just that the amount of attention may not be as high.
3. The study found that CEOs and board members have different perceptions about the level of a board member's participation. The adverse effects of this “disconnect” might be neutralized if the board president, along with the CEO, is involved in the NFP responsiveness plan.

### Benefits of the Model

I believe there are two major benefits that staff and board will realize from using this model:

1. While the investment by the CEO and board president is substantial and front-loaded (first year), new and less experienced board members feel their ability to govern and their participation is enhanced as a result of experiencing this orientation program. This can lead to more effective boards of directors and ultimately more effective NFPs. This model might enhance board member effectiveness in these ways:
  - a) Board members would be more educated about board service and better prepared to govern.
  - b) The NFP's responsiveness to board service needs may



help board members feel more connected and committed to the NFP, and thereby participate more.

- c) Establishing two-way communication early in the board member's tenure could facilitate developing a productive rapport between the board member and the CEO.
2. Individuals are attracted to serve on boards of NFPs that are responsive to board member needs and where they feel they are poised to govern. Implementing this model of board orientation can enhance an NFP's ability to recruit new board members.

## Closing

The objective of this research study was to create a new vision for managing board orientation. I did this by developing a model that included dialogue about board member needs and costs of participation and NFP responsiveness to those needs and costs, in addition to the traditional content found in many board orientation programs. This model was then tested as an intervention that would bring about improvement in a board member's perceived ability to govern and ultimately lead to an increase in their participation on the board. The results indicate that the model for new board member orientation positively and significantly impacted a board member's perception of their ability to govern and perceived participation. The engaged model has significant potential to help organizations do well by doing good.

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## Appendix A: Program Outline for New Board Member Orientation (2 hours)

### I. Perspectives on Board Service that need to be emphasized:

- Servant leadership as the impetus for board service
- Trusteeship as the nature of board service
- Governance as the *raison d'être* for board service
- Enhancing the ability to govern through the elements of the Governance Quotient
- Increasing board participation through cost elimination or reduction

### II. Information about the NFP that needs to be shared:

- The vision, mission, goals & objectives of the NFP
- The NFP's expectations of its board members
- The roles & responsibilities of board members of this NFP (e.g. bylaws)
- The roles & responsibilities of this NFP (e.g. personnel policies, O/D liability insurance)
- Board minutes (one full fiscal year)
- Meet and greet board officers and chief executive/executive director

### III. Environment that the NFP needs to create and sustain:

- Positive rapport and productive working relationship between the board and the chief executive
- Pleasant social and productive working relationship among board members

### IV. Roles that Board Members need to accept:

Ambassador	Change Agent
Facilitator	Fundraiser
Governor	Partner
Trustee	Visionary

### V. Behaviors that Board Members need to practice:

- Authenticity in their conceptualization about leadership
- Introspection in identifying and honesty in communicating their needs from board service
- Service as the first priority of their board leadership
- Courage in facing their "defining moments"

### VI. Competencies for Board Members that need to be developed:

- Resource development that funds organizational operations and vision
- Planning that is action-oriented
- Decision-making that respects the business/mission balance
- Communicating and advancing organization mission within the community
- Integrating, valuing and celebrating individual differences
- Encouraging and leading appropriate change
- Partnering with the chief executive, other board members and community resources

## Appendix B: Governance Quotient Assessment

Name: \_\_\_\_\_

**Directions:** In the Response column, use your cursor to select the response that most accurately reflects your level of agreement with the following statements. If you are unable to answer a question, use your cursor to place an "X" in the N/A column (Not Applicable).

Questions	Response	N/A
1. I am familiar and understand this NFP's		
a. Vision	BLANK	<input type="checkbox"/>
b. Mission	BLANK	<input type="checkbox"/>
c. Goals & objectives	BLANK	<input type="checkbox"/>
2. I understand what this NFP expects of me in my role as a board member	BLANK	<input type="checkbox"/>
3. I understand what responsibilities I have as a member of this board	BLANK	<input type="checkbox"/>
4. I believe that the board has a positive and productive working relationship with the Chief Executive (primary paid staff person)	BLANK	<input type="checkbox"/>
5. I feel that board members get along with one another and are able to work together effectively	BLANK	<input type="checkbox"/>
6. The needs and obstacles that I identified during my New Board Member Orientation were (listed in your Board Member Profile)		
Identified Needs:		
Identified Obstacles:		
Rate the NFP's responsiveness to your expressed needs and costs; where responsive means that the NFP has made attempts, which may or may not have been successful, to meet your expressed needs and/or eliminate or reduce your expressed costs:		
1. I feel that this NFP is responsive to my identified needs	BLANK	<input type="checkbox"/>
2. I feel that this NFP is responsive to my identified costs or obstacles	BLANK	<input type="checkbox"/>



Appendix C: Participation Assessment - Self

First-Year Board Member:

**Directions:**  
Rate your participation since being elected to this board by using your cursor to click on the box and place an "X" under the number that best represents your response. If you are unable to answer a question, use your cursor to place an "X" in the **Not Applicable** column.

Participation	Low		Average	High		Not Applicable
	1	2		4	5	
Attendance at scheduled board meetings	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Attendance at NFP-sponsored programs and events	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Assistance with programs and events	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Involvement with board committees, projects and task forces	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Leadership in board committees, projects and task forces	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Amount of financial contributions to the NFP	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Amount of time contributed to the NFP	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

**Appendix D: Participation Assessment - CEO****First-Year Board Member:****Directions:**

Rate the new board member's participation since being elected to this board by using your cursor to click on the box and place an "X" under the number that best represents your response. If you are unable to answer a question, use your cursor to place an "X" in the **Not Applicable** column.

Participation	Low		Average	High		Not Applicable
	1	2		3	4	
Attendance at scheduled board meetings	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Attendance at NFP-sponsored programs and events	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Assistance with programs and events	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Involvement with board committees, projects and task forces	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Leadership in board committees, projects and task forces	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Amount of financial contributions to the NFP	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Amount of time contributed to the NFP	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>