

# Board Training: Are You Making the Right Choices?

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Are you thinking about doing board training? Having a board retreat? Yes! But why are you thinking about holding this training or retreat now? What conditions exist in the organization, or specifically within the board, that make you think training is necessary or potentially helpful?

There are lots of good reasons to conduct board training. Among the more obvious are:

1. You have just formed the board—they are working together for the first time
2. You have many *new* board members—most of whom have never served on a nonprofit board
3. You have just experienced a significant turnover of board members
4. Your board may have been in existence for a while, but they have never received any formal training on how to be a board or how to decide what kind of board they want to be
5. Your board has been working together for a while, but they could benefit from a “refresher” on some fundamental principles of board effectiveness
6. The board is attempting to create something new, or to make a significant change, but doesn't have the requisite knowledge to make informed decisions

But, there are also reasons why board training may not achieve the results you are looking for! At the Center for Nonprofit Management, we receive frequent requests to do “board training.” Often, one or more of the above reasons are appropriately cited as the motivation to do this work. Just as often, however, the reason given for pursuing a board training session is that “we are having problems getting things done,” or “the board is not working well together,” or “the board is not accepting their full duties and responsibilities.” These types of responses raise a critical question in selecting the appropriate developmental activity for your board: “Is the problem a *deficiency of knowledge or skill* among the board, or is it a *deficiency of execution* in getting meaningful results?”

For boards to perform effectively, they must possess collective knowledge and skill in some very fundamental areas:

1. Knowing the roles and responsibilities of nonprofit boards, and the roles and responsibilities of individual board members
2. Structuring the work of the board (e.g., committees) in a way that will optimize effectiveness within their current capabilities
3. Developing the appropriate working relationship with professional staff (if one exists)
4. Understanding and accepting their role of fiduciary oversight
5. Understanding and accepting their responsibility for fundraising and resource development

But board effectiveness requires more than collective knowledge and skill. It must also include the effective application of that knowledge and skill to the business at hand—the ability to implement. And when it comes to addressing the inability of the board to “get things done,” training may not be the most appropriate course of action!

Often, boards are less than effective because of reasons other than deficiencies of knowledge and skill. Some conditions we frequently see in our work with boards are:

1. Competing personal agendas
2. Poor management of meetings
3. Poor decision making and problem solving
4. Strained interpersonal relationships, among board members and between board and staff
5. Little or no accountability for results
6. Unresolved disagreements/conflicts
7. Unproductive work practices
8. Unwillingness to raise money

These conditions are usually systemic to the organization and/or the board and frequently result from poorly designed, or totally absent, systems, procedures, and behavioral norms for working together, and are not necessarily due to deficiencies of skill or knowledge. Board members “know” what to do, but are inhibited from effective implementation due to any number of factors, among which can be:

1. lack of consensus on vision, mission, and strategy
2. lack of well defined methods for organizing and coordinating the board's work

3. poor communication practices
4. no mechanisms for resolving disagreements/conflicts
5. inadequate resources
6. weak or absent reward and recognition practices

While these conditions may be partially addressed through training, most often, they require a developmental strategy that focuses the board inward—causing an honest and accurate evaluation of what’s working and what isn’t. Occasionally, the board chair, another board member, or the executive director has the ability to lead the board through this type of process. But, more often, these issues are effectively facilitated through a third-party intervention, usually a consultant experienced in organizational behavior and effectiveness.

What this type of consultant can provide is:

- a) an objective diagnosis of the issues impacting board performance
- b) assistance in framing and prioritizing issues appropriately
- c) demonstration of cause-and-effect relationships influencing board outcomes
- d) guidance in establishing systems, processes, and behavioral norms tailored to the specific conditions and needs of your board
- e) forums, methods, and practices through which the board can actually work together to plan and problem solve as needed
- f) group facilitation, to help the board stay on target and move through the “rough spots” of its deliberations.

While the focus is “how to implement” through processes, procedures, and norms for working together, not to teach knowledge or skill sets, new learning is almost always an ancillary benefit of this approach.

Effective board training is based on an accurate diagnosis of the situation – What is happening? What do you want to change? What results do you want to accomplish? Ask “Do I need to *inform* the board?” or “Do I need the board to *perform* better?” Sometimes, the answer is “both.” But recognize that each initiative usually requires a different approach if you are to adequately identify and remove the “root causes” of sub-par performance.

So the next time you get the urge to do board training, think carefully about what you want the training to accomplish. If you need to make your board smarter with new information, you are probably on the right track. If you need your board to implement, execute, and “get things done,” classroom-style training might only be a partial answer, if an answer at all.

Be cautious not to be seduced by the *appearance* that training is more economical, and less time consuming, than a facilitated board development process. Or, that training is “less threatening” to the board and is an “easier sell.” If training does not adequately address the root cause of issues in board performance, it can be very wasteful and demoralizing, and the basic issues will continue to recycle themselves throughout future board performance. This “recycling of problems,” and the added resources and attention it requires, can easily dissipate any resource “savings” you thought you might have accrued through a classroom approach.

Deficiencies in execution are rarely resolved through training alone. As in any leadership group, systemic issues are best resolved by the members themselves identifying and working through the conditions that are inhibiting their best performance. And in most instances, this effort can be encouraged, facilitated, and enhanced with the help of a competent and objective third party.