



## BOARD *room*

# Encouraging Visionary Board Leadership

*Do your board members have the qualities they need for visionary leadership? Use this checklist to highlight areas for improvement.*

BY FRANK MARINELLI

**T**he pace of change is greater today than ever before, requiring nonprofit boards to look and act differently than they did years ago. Some forward-thinking boards have already made the transition. They provide a new profile of board effectiveness, from which we can all learn useful lessons.

### **EIGHT CHARACTERISTICS OF VISIONARY BOARD LEADERS**

The new board leaders have the following eight qualities:

1. **They are visionary and future focused**, spending most of their decision-making time looking forward.
2. **They possess an entrepreneurial spirit**, understanding that their organizations operate in a fast changing marketplace, seeking products and services to meet emerging customer needs.
3. **They are risk takers**, balancing the need to take chances with traditional stewardship responsibilities of board service.
4. **They are good communicators**, understanding the importance of communication at all levels and organizing the board and its committees accordingly.<sup>1</sup>
5. **They are systems thinkers**, seeking the root causes of issues they face in the boardroom.
6. **They find courses of action that will exert the highest possible leverage** as they respond to those issues.

7. **They discover creative ways to connect their organizations to the world around them**, exploring new partnerships and alliances that will support their missions and advance their strategic plans.
8. **They value diversity**, understanding that it promotes creativity, innovation, organizational learning, and responsiveness to customers.

### **SEVEN BARRIERS TO VISIONARY BOARD LEADERSHIP**

The above characteristics position board leaders to exert a visionary leadership style. Barriers, however, may get in the way. Examining these barriers is an important step in revitalizing a board or building a powerful board from scratch. Let's look at some of these barriers now:

#### **1. Shortage of time.**

To play a visionary leadership role, board members need time to attend meetings, read materials, and maintain contact with each other between meetings. A board can help its members optimize their time by being organized and careful not to waste time on trivial matters.

#### **2. Fear of risk.**

To be innovative in decision-making, boards must be willing to take chances, to try new things, to take risks. This risk-taking flies in the face of traditional wisdom about board stewardship responsibilities. Success in new programmatic ventures

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is never guaranteed. Board leaders must strike a balance between taking chances and maintaining their traditional stewardship role.<sup>2</sup> Boards need to acknowledge this tension and discuss it with funders, donors, and other key supporters.

### 3. Non-involvement in strategic planning.

More than any other activity, strategic planning gives boards a chance to think about trends that will affect them and to devise responses. This opportunity to reflect together on the big questions facing the organization provides new vision, a sense of future direction, and the energy to move forward. When board members aren't involved in strategic planning—or are involved only superficially—they lose an important chance to hone their visionary leadership skills.

### 4. Lack of knowledge in a complex world.

Busy board members frequently lack a deep understanding of critical changes, trends, and developments that challenge assumptions about what success looks like. We see this shift most dramatically in the areas of health, education, and welfare. Often, this lack of knowledge keeps board members from acting decisively.

### 5. Micro-management.

Recently the city council of a major city spent almost an entire meeting deciding what color to paint the stadium seats. Such hair-raising stories of boards spending untold hours on trivialities while neglecting major items are all too common. To be sure they focus on what is really important, board members must avoid the temptation to micro-manage or meddle in areas more appropriately handled by staff.

### 6. Attachment to old ways.

In their book, *The Accelerating Organization*, Maira and Scott-Morgan describe an important principle of survival.<sup>3</sup> Natural systems, they note, continuously shed rules that cease to be relevant as conditions change. Successful organizations must do the same. Organizations, they surmise, "can hold only a small number of rules and opera-

tions at any time so they must have the ability to shed old rules to make room for the new. Shedding becomes more complicated in systems involving human beings, because their sense of self worth is often attached to many old rules." If board members can't overcome this all-too-human feeling of attachment to the familiar, they may overlook valuable

opportunities that conflict with those old rules.

### 7. Confusion about board-staff roles.

While boards rightly expect executive directors to be visionary and decisive, this doesn't mean that the board should sit and wait for direction and

## THREE STEPS TO A VISIONARY BOARD

### I. Look for board members with these qualities:

- future-focused, big-picture thinking
- an entrepreneurial outlook
- a high tolerance for risk taking
- communication skills
- an ability to see collaborations, partnerships, and other creative strategies that will obtain optimum results
- a deep appreciation for diversity

### II. Work to overcome these barriers to visionary board leadership:

- lack of time
- avoidance of risk
- lack of board involvement in strategic planning
- board unfamiliarity with critical issues
- the board's tendency to focus on trivial issues
- people's inclination to cling to old ways of doing things and avoid change
- lack of clarity about board-staff roles and responsibilities

### III. Implement these strategies for visionary board leadership:

- Give board members a key part in creating a strategic plan and vision for your organization.
- Encourage the board to concentrate on ultimate ends and avoid the tendency to micro-manage.
- Be sure your board recruitment process includes a five-year plan for prospecting, recruiting, selecting, orienting, and training future board members. Also, plan to evaluate their progress each year.
- Provide board members with well-summarized, readable information on relevant trends.
- Keep the board in touch with your customers and their changing needs.







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inspiration. Unfortunately, however, that's what some boards do, assuming that it's the executive director's job to do the visionary thinking. This confusion can result in boards that don't exercise visionary leadership because they don't think it's their job.

In a less competitive past, boards didn't have to be visionary. Time was when clients, members, and consumers would just walk in the door on their own—or so it seemed. Boards didn't consider marketplace pressures—or for that matter the existence of a competitive marketplace. Today all that has changed. The leadership style of many boards, however, hasn't kept pace with this new reality.

## FIVE STRATEGIES FOR VISIONARY BOARD LEADERSHIP

Now let's look at five strategies that can help your board adopt a visionary leadership style.

### Strategy #1

**Focus on Ends, Not Means.**

As John Carver notes in *Boards That Make a Difference*, boards must concentrate on the organization's ultimate ends rather than the day-to-day means.<sup>4</sup> Board members should focus on the mission, vision, goals, and strategies contained in the strategic plan. They should leave daily management to the staff and executive director.

### Strategy #2

**Create a Plan to Develop Board Leadership.**

The typical board recruitment process focuses on filling board vacan-

cies for next year only. To be visionary, however, boards need a long-range plan for developing future leadership. Such a plan should center on the following questions:

- Who will lead and serve the board over the next five years?
- What is our plan to scout leadership talent for the future?
- How will we go about fostering and developing future board leadership?

Key action steps include the following:

- Replace the nominations committee with a board development committee. Use the above questions to devise a board development process. This process should include prospecting, recruiting, selecting, orienting, training, and assessing performance.
- Link board development to your strategic plan. Decide what skills, knowledge, personal contacts, and other attributes board members will need to advance the strategic plan. Based on this analysis, identify board recruiting priorities.
- Write a job description for the board members you plan to recruit. Be sure the description includes the attributes you identified in the previous step.
- Direct the executive committee to design board meeting agendas that focus on ultimate ends and avoid micro-management.
- Evaluate the board once a year.<sup>5</sup> Be sure to check how well the board is doing in maintaining its "ultimate ends" focus.
- Develop a board orientation program to speed up the learning curve for new

board members. Give them enough training so that they can hit the ground running in their first meeting. Again, remember to link this program to the strategic plan.

### Strategy #3

**Develop a Shared Vision.**

The key question for boards is the following: "If we could create the organization of our dreams with the impact we most desire, what would it look like?" The board's answer captures the organization's vision. It's critical that the board be involved in developing a shared vision, the centerpiece of the strategic plan. Once the board has developed a vision statement, look for ways to live the vision in your organization. For example:

- Use the vision as a framework for board decision-making in every meeting—not just during the annual planning retreat.
- Share your vision with the community. Going public motivates people to live up to the vision.
- Ask board members what they think is most inspiring about your vision statement's wording.
- Use the vision as the basis for regular dialogue on emerging issues and challenges.
- Seek media coverage when strategic plan milestones are reached. Use these milestones as opportunities to promote your vision both inside and outside the organization.

### Strategy #4

**Keep up with the Rapid Pace of Change.**

Provide information to help the board think about these key questions:

- What external changes will have the greatest impact over the next three to five years on the organization and the people it serves?
- How can the organization effectively respond to these trends?
- How are similar organizations responding to these trends?

Remember that busy people have trouble finding time to read. So when you







share information with the board, especially in printed form, make sure it is timely, relevant, and well-summarized. Here are some suggestions for helping board members stay abreast:

- Schedule time during regular board meetings to discuss the impact of external changes.
- Encourage individual board members to read, listen, and look for information about the changing environment and bring it to the board's attention.
- Periodically send board members short, readable articles summarizing relevant trends.
- Involve the board in ongoing strategic planning, which will expose them to external trend data.

### Strategy #5

#### Stay Connected to Customers' Needs.

Give board members information to keep them in touch with customers' changing needs. Key questions include:

- What do our constituents think of the organization? What is the organization's image in their eyes?
- What are our constituents' most important future needs and service expectations?
- What other organizations are positioned to meet these constituent needs?

Consider the following activities to nurture visionary leadership and link your board with your constituents:

- Create opportunities for board members to "meet the customer." One organization schedules an annual "town hall forum" where board members can hear constituents talk about their emerging needs.
- Tap staff knowledge of clients to deepen the board's understanding of your customers.
- Establish a marketing information system to give the board data to support its role.

A shared vision is the centerpiece of the strategic plan.

## GROUNDWORK FOR CHANGE

The practices described here reinforce each other. Here's how to use them to transform your board:

**1. Characteristics.** Review the eight attributes of visionary board leaders. Use these factors as a checklist to assess your board. Identify areas that need improvement.

**2. Barriers.** Scrutinize the seven barriers to visionary board leadership. Some will be familiar. All can be overcome. Begin work now to remove these barriers.

**3. Strategies.** Remember, an effective, visionary board is built on five key strategies. Use them to lay the groundwork for board and organizational effectiveness in this time of rapid, profound change. ■

#### Footnotes

<sup>1</sup>See *Public Relations and Communications, Leadership Series, Volumes I and II* in "Selected References," especially "How Do Effective Nonprofit Leaders Communicate?" and other articles by Larry Lauer.

<sup>2</sup>To help your board reach that balance and assess its own willingness to take risk, see "Watershed or Waterloo?" in *Enterprise, Leadership Series*, edited by Jill Muehrcke (noted in "Selected References.")

<sup>3</sup>*The Accelerating Organization*, by Arun Maira and Peter Scott-Morgan, 1997 (New York: McGraw Hill).

<sup>4</sup>See Carver in "Selected References." For other insights by John Carver, see *Board Leadership & Governance, Leadership Series* in "Selected References."

<sup>5</sup>For an excellent board evaluation tool, see "Board Self-Assessment: The First Step to Effective Planning" in *Board Leadership and Governance, Leadership Series*, edited by Jill Muehrcke (noted in "Selected References.")

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These publications are available through the Society for Nonprofit Organizations' Resource Center Catalog, included in this issue, or contact the Society at 6314 Odana Road, Suite 1, Madison, Wisconsin 53719 (800-424-7367).

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