

Vision: Leadership Focus



January 2010

Continuous Learning

You're Never Too Old to Learn, But You Can't Teach an Old Dog New Tricks!

So which thought rings true for you or your organization? Okay. No one wants to admit to being too old to learn. And we're very sure no one really wants to admit to being an old dog! On the other paw (I mean "hand"), we can get smitten with new tricks, right? So how do we sort out the fad from the fundamental or the fantastic?

New ideas refresh and enrich us and benefit our work. They are a worthy investment of time and money. We get excited when we help each other bring goals to life. But for many

reasons, most don't make the time to tap a range of learning opportunities. It's even rarer to **set specific learning goals and commit to apply them**. But, exceptional organizational stewards consider continuous learning essential. Boards know they must be responsive to new demands as well as opportunities and requirements.

This issue discusses the 11th principle, Continuous Learning, from the BoardSource book, *The Source: 12 Principles of Exceptional Boards*. It notes that exceptional boards **embed learning plans** into their routine governance work and also cultivate opportunities outside the boardroom. They reflect on historical milestones and notable bumps in the road -- learning from their experiences -- and tap into past, present, and future stakeholders to build on successes.

As you reflect on the board's role in continuous learning ask yourself:

1. What do you want the board and the organization **to know**?
2. What do you want the board and the organization **to do**?

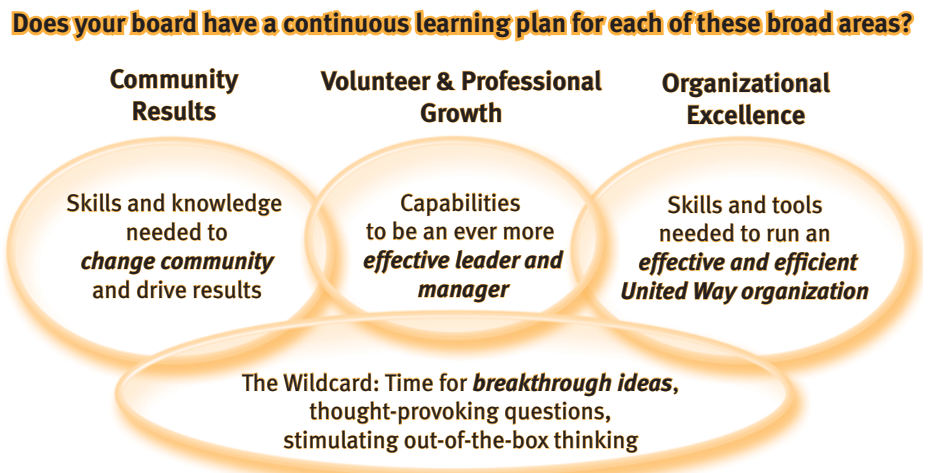
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Fast Focus Tips

- Exceptional boards gather feedback on their collective achievements and unique contributions.
- They undertake periodic board assessments and address individual performance.
- They invest time and resources in board development.
- Exceptional boards strive to improve meetings and restructure committees periodically.
- They maximize the unique collective judgment, wisdom, and thoughtfulness of the board in pursuit of its mission and vision.

Find the book,
*www.boardsource.org

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12 Principles of Governance That Power Exceptional Boards

1. Constructive Partnership
2. Mission Driven
3. Strategic Thinking
4. Culture of Inquiry
5. Independent-Mindedness
6. Ethos of Transparency
7. Compliance with Integrity
8. Sustaining Resources
9. Results Oriented
10. Intentional Board Practices
11. Continuous Learning
12. Revitalization

Vision features one 'power' principle in each issue.

Silence is Golden, But the Squeaky Wheel Gets the Grease. Are You Reactive or Proactive?

It's easy to get caught in a reactive mode and run out of time to plan ahead. Proactive boards routinely invest in several annual or scheduled activities:

- ❑ Offer **annual orientation** for new board members and prepare them for their first meeting. Key areas: understanding legal obligations, comprehensive financials, and getting a strong connection for the current direction of the organization. New members have needs and aspirations that led them to accept the position. Incorporate interactive training in the orientation to ensure responsiveness to their needs. Provide **committee member orientation** (formal or informal) and review the committee's charges in light of strategic goals.
- ❑ Participate in **board or organizational assessment** and occasional assessment of board meetings.
- ❑ **Craft agendas** to allow sufficient time for learning conversations that expand board members' understanding, stimulate creative solutions, and increase enthusiasm for the work at hand. These practices respect members' time and intelligence and use precious meeting time for dynamic interaction.
- ❑ Commit to an **annual board retreat** or other in-depth strategic planning process and progress review.
- ❑ Ensure that **volunteers as well as staff** are equally well-trained and prepared. Encourage a **culture of continuous learning** to percolate throughout the organization in formal and informal ways.



Reactive strategies include:

- ❑ **Adapt during a crisis** and seek out new information when direction isn't clear.
- ❑ Take advantage of **teachable moments** and respect thoughtful ideas when they arise. Incorporate appropriate "lessons" into the board's ongoing work.
- ❑ **Take stock** in the event of unexpected challenges with staff or volunteers, implementation obstacles, or other happenings. Recognize that no framework or practice is static or works in all circumstances.

**Make learning stick:
Make the familiar exotic
and the exotic familiar!**

Responsible Boards x	The Source of Power =	Exceptional Boards
Orient new board members	Learning activities built into board work	Are well-informed about the external environment
Use board members' skills	Knowledge drawn from outside the boardroom	Grow on the job, and contribute at increasing levels
	Board evaluation of individual and collective performance	Regularly upgrade their governance practices

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Birds of a Feather Flock Together, But Opposites Attract. Variety = Brain Power!



You know the geese story, right? The flock takes off. One leads for a while, and then another comes from behind and takes over. The practice helps share the burden of leadership and refreshes the whole flock. In our work, we are blessed with inspiration from many sources. Innovation and best practice discovery are just around every corner for the taking.

Exceptional boards infuse new ideas into their networks. Refresh your board and committee leadership with new people and energy. Foster curiosity by tapping all types of learning modes. In other words, go way **beyond putting out the board packet**. How many of the following has your board participated in?

1. Local, regional, or national conferences, courses, or workshops
2. Connections across United Way border lines
3. Representation in regional, state, or national leadership opportunities
4. Conference calls or webinars
5. Distribution of newsletters, issue papers, or public policy updates
6. Coaching, quick phone calls, technical advice, interactive learning, CD-ROM resources
7. Networking one-on-one and roundtables

It's clear that volunteer time is precious. However, the entire organization can benefit from the same variety of engagement, and the board can help in driving that commitment. Return to the list, above, and check staff's involvement to support organizational success.

So you went to the workshop, took notes, and had meaningful conversations. Ensure that your investment in time and training funds pays off. Sustaining innovation requires a plan and follow-through. For important topics, initiatives, or key tasks, make a commitment to put learnings into action. Consider the following strategies to **support your top priorities**:

- What do you want the model or initiative to do for you? Set **SMART** goals: **S**pecific, **M**easurable, **A**chievable, **R**elevant to the Mission and Vision, and **T**ime-Based
- Once decisions are made, take advantage of ongoing expertise, formal or informal, especially hands-on coaching or consultant facilitation, reported to be among the most effective modes to transfer learning.

Appreciative Corner: If at First You Don't Succeed, Try, Try Again; But Don't Beat a Dead Horse

Do you have a persistent challenge? Try building on strengths. Gary Hamel's book, *The Future of Management*, identifies four insightful questions*:

1. What's the 'tomorrow problem' that you need to start working on right now?
2. What's the frustrating 'either/or' you'd like to turn into an 'and'?
3. What's the espoused ideal you'd like to turn into an embedded capability?
4. What's the 'can't do' that needs to become a 'can do'?

A single conversation across the table with a wise person is worth a month's study of books.
-- Chinese Proverb

Which question sparks your curiosity? Once you've answered the question that most interests you, have a board chair-chief executive chat over coffee and brainstorm about ideas. Or, try out paired conversations at your next board meeting to **draw out related successes**. Ask:

- "When has there been a time when we experienced good results with 'x' approach? Who was involved? What values led the strategy?" or
- "What skills were involved in making 'y' happen? How have we tackled similar issues in the past?"

Indiana Association of United Ways...Bringing Indiana United Ways together to help them create a successful future.

Community - Building a network of local United Ways/Funds in Indiana to increase their learning and collective achievement

- 63 member organizations
- 1010 matching grant program
- Roundtables and collaborative assistance
- Vision Leadership Focus newsletter

Performance - Creating and delivering tools and resources increasing members' capacity to serve their communities

- State Leaders Conference and recognition programs
- 1010 grant technical assistance and training
- Regional conferencing and national program hosting
- Software user groups
- Indiana Nonprofit Resource Network
- NP&AS, Nonprofit Processing & Accounting Service
- Emergency Food and Shelter Program (EFSP)
- www.iauw.org and other Web site features

Advocacy - Representing United Ways to external audiences that contribute to United Way effectiveness and presenting education, income, and health learning and practice to members

- Partnerships and strong relationships with Indiana University Center on Philanthropy, Indiana Coalition for Human Services, Indiana Voluntary Organizations Active in Disaster
- Public Policy
- United Way Council of States and other national involvement
- Indiana 211
- Youth Philanthropy Initiative of Indiana
- Indiana Afterschool Network
- United Way of America

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Give it a Try: Tapping the Everyday Genius

Exceptional boards have dynamic board meetings. Here are some great tips:

- ☑ **Capture the board's "collective brainpower"** from internal and external experiences.
- ☑ Include periodic reports from program staff or have **mini-lectures from local experts** to extend board members knowledge and relationships.
- ☑ Create **friendly seating arrangements**. Ignore the standard practice of having U-shaped seating. Set tables so small-group work and board relationships happen more

easily. Incorporate **brief icebreakers** during pre-meeting time so members can learn a little about each other. The more comfortable they are, the more productive their discussions will be. Always **use nametags** at every meeting so no one is ever embarrassed if they forget a name or affiliation.

- ☑ Periodically **distribute index cards** for board members to jot down their observations or share a best practice when there isn't time on the agenda. That way the board chair and chief executive continue to get feedback throughout the year.

laUW Supports

Watch for sample Board Orientation slides and a customizable Board Manual in the laUW member's area at www.iauw.org in January. Check the Web site for a current training calendar and events flyers. Contact Lisa Hanger to discuss training requests. Contact Indiana Nonprofit Resource Network, www.inrn.org, for any aspect of board training or strategic planning.