

# Vision: Leadership Focus



Indiana Association  
of United Ways

September 2007

## Fast Focus Tips

- Exceptional boards are results-oriented.
- They measure the organization's advancement toward mission.
- They evaluate the performance of major programs and services.

Find the book,

\*[www.boardsource.org](http://www.boardsource.org)

## Confessions of Top Volunteers

It's 4 PM on a Thursday afternoon. Estelle, a United Way board member, and Harry, an Allocations/Investment Council volunteer, have arrived on time for their respective meetings. Being highly responsible volunteers, they did their pre-meeting readings and jotted down some insightful questions to bring up at the most appropriate times. They used respectful listening skills and kept their comments to the point. Who could ask for more? Well...what about the big picture? What difference does it all make? Some of our most dedicated volunteers, and the organizations they serve, might confess that they overlook the most important role a nonprofit board plays – mission stewardship.



Mission stewardship is a challenging and exciting role. **First**, the board must provide vision, inspiration, and direction, making key decisions about the best ways to use resources. **Second**, the board must ensure progress by holding the United Way accountable to make the best use of these resources. **Third**, the board must attract more resources by inspiring prospective donors and partners. **Fourth**, it must evaluate mission success. It's this fourth role that may be missed and must relate to the other three roles. In the book *The Source: Twelve Principles of Governance That Power Exceptional Boards*, written and published by BoardSource, 2005, being a **Results-Oriented Board** is one of the 12 principles.\*

Mission stewardship goes beyond evaluating and monitoring funded programs and is more than outcome measurement. Thinking in broad terms, are you evaluating Community Results, Professional Growth (the skills to do all the rest), and Organizational Excellence? For example, organizational excellence includes community engagement. Do you have a plan for reaching out to new partners, engaging prospective donors in new ways, and drawing out what is important to the community in general? If you have a plan, how are you measuring it? What are you doing with those results? Read more to explore being a Results-Oriented Board.

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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 Resource
- 9. Results Oriented**
10. Intentional Board Practices
11. Continuous Learning
12. Revitalization

*Vision* features one 'power' principle in each issue.

## 7 Top Questions: Outcome-Focused Planning for Community Change

Community Outcomes are one piece of the 'results' puzzle. The following tips are similar to but different from agency or program outcome measurement steps. When applied to a community initiative, the goal is often longer-term and requires a multi-pronged measurement to complement a comprehensive strategy.

**One:** What, exactly, is our target outcome? Target specific results for specific populations.

**Two:** What stands between the population and the intended result? Push to uncover the underlying issues, not surface symptoms.

**Three:** What changes in community do we want to create?

**Four:** How will we bring about changes in community conditions?

**Five:** How will we know if what we're doing is working? Plan ahead to measure effectively and efficiently. Where will you get your information? Who already has some of the data you might need?

**Six:** How will we mobilize needed resources?

**Seven:** What is our overall plan for action? Have you tested your theory of change?



<b>*Responsible Boards x</b>	<b>The Source of Power =</b>	<b>Exceptional Boards</b>
Monitor financial performance	Incisive program evaluation	Maximize resource utilization without micromanaging
Receive programmatic updates	Meaningful performance metrics	Focus on outcomes, not inputs
	Early issue identification	Drive programmatic activities to excellence
	Benchmarking against peers	

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## Ten Ways Boards Can Use Evaluation Findings\*\*

### 1. Assessing the chief executive and the board itself:

E-mail [roger.frick@iauw.org](mailto:roger.frick@iauw.org) for a quick one-page board mini-self-assessment.

### 2. Fundraising:

Use stories and data to inspire donors.

### 3. Recruiting board members:

Know your organization's history and successes as each relates to mission to attract new volunteers.

### 4. Strategic planning:

What's working? What needs refinement or re-direction? What needs more or different resources?

**5. Managing finances:** Are you targeting goals with the right proportion of resources? Do you have sufficient time, equipment, skill sets, and other resources to get the job done?

### 6. Assessing the organization:

Are volunteer roles keeping pace with new services or priorities? Is realignment needed?

**7. Celebrating success:** Thank and praise where needed, often. Repeat.

**8. Business planning:** Are there better use of resources or income streams being overlooked?

### 9. Managing human resources:

Focus skill improvement investments aligned with mission and goals; review performance appraisal results in a collaborative way.

### 10. Engage in a strategic alliance with other nonprofits:

Identify new resources needed that could be a win/win for another organization.

“The greatest thing in this world is not so much where we are, but in what direction we are moving.”

- Oliver Wendell Holmes

## Appreciative Corner: Evaluating Successes

Board conversations about evaluation and measurement require thoughtful time and open discussions. Here are some questions that might help the process along. Try the questions in pairs, first, if time allows. You'll be more likely to avoid group-think and draw out the best ideas of each board member.

◆ In five years, you Google your organization and find dozens of listings for successes, honors, and specific accomplishments. You know you achieved this recognition by establishing milestones. What milestones did

your organization achieve first, second, or tenth?

- ◆ How did those milestones come about? What were the key factors? Who was involved? What was your role? What skills or actions were important?
- ◆ How did you apply the first couple of successes that

helped bring about the later successes?

- ◆ What will keep you inspired to move toward your goals in the future?
- ◆ What one thing did your organization *not* have on its 'results-oriented radar' in the beginning that turned out to be important in the long-term?



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

**Serving Members:**

**Relationship/Association** - facilitate and foster the collective activity of members for growth, development, and increased performance.

**Learning/Training** - distribute knowledge, experience, and technology to leaders (staff and volunteer).

**Research & Development/Innovation** - test and develop new concepts and technology for application to local UW operations.

**Representation** - participate in external collaborations and state level activity on behalf of members and carry the needs of members to external funding sources.

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## Give it a Try: What’s the best thing since sliced bread? A Dashboard.

You wouldn’t drive without the dashboard in your car. Why attempt it when driving your organization toward its goals?

For every board meeting, consider having a dashboard that will give everyone a quick grasp of progress and milestones specially developed to match your current goals and target strategies. **If you already have a dashboard, consider expanding it to include broader goals that need to be on your radar.** Your dashboard might start like this:

**Board Matters**

- Nominating committee met and made recommendations for 2 board vacancies
- Board planning retreat set for December 1

**Resource Development** (thinking beyond the fall campaign alone)

- Prior-year campaign chairs met with new co-chairs and made recommendations



- Summer Solicitor’s Training date set
- New Small Business targets selected, relationship contacts evaluated, and calls prioritized
- 6 new prospective donor relationships established for long-term goals

**New Community Relationships**

- Planning team met to evaluate future community collaborators that support priority initiatives
- Target collaborators prioritized, five introductory meetings set

By the way, what would happen if you started every board meeting with the question, “what’s the best thing since sliced bread that has happened with our United Way since we last met?”