

# Strategic Boards in All-Volunteer Organizations

*Jane Garthson*

When board members are also your primary workers, many people assume a ‘working board’ is the only possible approach. I’ve never really understood the term myself, as any board member of any type of organization should be hard-working. I realize they mean the board members are doing operational work that would be done by staff if there were staff. However, the primary role of a board should still be to govern.

Far too often, the board agendas of all-volunteer organization are focussed on rehashing and reviewing the work of operational committees and individual volunteers. The directors, who of course sit on these committees as well, feel they cannot give even more time, especially not for luxuries like strategic planning, community engagement, proactive board recruitment, financial oversight or risk management. They do not need to be asked for more time, just a more productive and satisfying use of their existing time together.

## ***What is the highest potential of an all-volunteer organization?***

In my mind, it is the same as for a staffed one—to serve its mission well and make great progress towards its vision. That means using the resources it does have wisely, just as with any other nonprofit, towards the desired outcomes.

Some people assume that every all-volunteer organization is in a temporary state while it searches for funds so they can hire. For most of the ones I know, it emphatically does not mean that. Many organizations have missions they feel are best served by volunteers, and leaders who have no intention of growing the nonprofit to the point where it would be large enough for staff. They need more money, but not that much more. A staffed organization would change the very nature and culture of the organization into something unrecognizable and unwelcome.

I sit on three all-volunteer boards. One hopes to grow to the point of having staff someday, but it’s not high on the priority list; an association management person, fee-for-service, fills the needs well for now. The other two have financial wish lists that don’t even have staff on them, and no intention of ever hiring.

## ***What five conditions could help an all volunteer organization to become strategic?***

- **Visioning:** Envisioning an undesirable future, and realizing that it might come true if the organization does not identify, plan for and work towards a better one. One of my organizations runs a small, highly participatory, international music festival. Music is fast becoming something many people do in home studios with relatively low cost software and equipment. There’s lot of interesting free music on the Internet, so making and listening to music can be something done entirely alone. For a group that places a very high value on friendship and support, music that doesn’t include circles and hugs is unthinkable. Directors who thought they’d never to do strategic planning suddenly wanted to, and have kept it up. There’s nothing that makes boards want to be strategic more than a time first to be creative. If

they define the world they are trying to create, they will want to plan to make it happen, and dedicate what resources they have towards that.

- **Delegating Well:** Give operational authority, within budget, to committees. A two-page Terms of Reference document is invaluable. Directors can avoid worrying that they must constantly see the details of committee work. Committee results can be monitored, and members held accountable, without endlessly revisiting trivial items. One group I joined had “T-shirts for event volunteers” on every agenda, worrying at the issue like a dog with a bone, instead of letting the event committee make the decision. Sigh.
- **Agenda Control:** Rigorous monitoring of the Board agenda is essential to keep operational items off. A Canadian colleague, Brenda Zimmerman, termed the inappropriate trivial items “menus and venues.” I used to refer to them as “napkin colours and kitchen supplies” but I like her phrase better. If an operational item is coming to the board table, clarify on the agenda exactly why. Does a committee need a budget increase? Does the Workshop Task Force seek the board’s approval in principle for the theme of next year’s series? Is a committee considering a sponsorship that doesn’t fit the sponsorship policy? Be specific, and never allow an agenda item of “committee reports.”
- **Non-Board Volunteers:** Part of the reason that board members don’t have time to be strategic is that they try to do everything. Many admit they are very poor at recruiting volunteers to carry more of the operational work so they would have time to govern. Likely each such board has someone who is good at recruiting volunteers; recognize and support that individual in leading volunteer recruitment and retention. And ask every operational committee to have at least two non-board members. Have non-board members become co-chairs. Since these individuals aren’t at the board table, it becomes less appropriate to discuss the operational issues there.
- **A Governance Champion:** Even the smallest organization can find someone with passion for their cause whose experience in other organizations helps them understand the importance of certain governance activities, like following bylaws and having financial statements and reports. That person can add to their knowledge through free or almost free local training, e.g., lunch and learn sessions, in most cities. And there is a wealth of free resources on the Internet, and great forums and groups where this champion can ask questions as issues arise. As with the “volunteer coordinator”, recognize and support that person, and find at least one other board member to work with them on preparing for annual general meetings and the like.

### ***What actions are needed to make these conditions come true?***

Well, you can see I’m referring to policies and budgets and terms of reference.

Such governance documents free up board time for what matters, but they take time to put in place and maintain. And all-volunteer organizations have to carefully choose which policies and plans to spend time on; there isn’t time for a whole policy manual. Most of a policy manual may exist after enough years, provided the Secretaries have been careful to keep a set of policy approvals separate from the minutes, where they can be found and be organized by topic not

date. At the start, be very selective about what to spend time creating. I have found three document types to be particularly valuable:

1. **Committee Terms of Reference/Officer Job Descriptions:** These are incredibly helpful for people taking on the roles; they do not have to guess at expectations or re-invent the wheel. And the board can relax if they show evidence that they will carry out their responsibilities conscientiously, and focus on oversight rather than hands-on involvement.
2. **Candidate Recruitment Information:** Let people know up-front what will be expected of them as directors, including key governance responsibilities, meeting attendance, committee participation, annual donations if applicable, and more. I find a job description and a backgrounder that gives an overview of the organization and governance status—three to four pages in total—helps ensure that new directors realize they have joined to govern, and become effective much more quickly. Of course it should be supplemented by an orientation process for those who are successful in being elected or appointed.
3. **Annual Budget:** This is of course essential for ensuring that you operate within resources, but it can also be allocated strategically to make sure the available resources are used for the board's top priorities. Directors then know what's available for the projects or programs they are working on and can plan more appropriately. The Education Committee doesn't suddenly discover that the monies they budgeted for community sessions has been spent by the Publicity Committee or whatever. Directors can also explain to potential donors and other supporters exactly how the monies will be used for community benefit.

Preparing these types of documents is a great investment, and you can save some time if a board member has good samples or templates from a similar organization. Adapt them; don't just change the organization name!

### ***What barriers will need to be overcome?***

Inevitably, boards will slip back into operational mode at times. Perhaps the big event is approaching, or a committee didn't do its job, or a major new operational task has come up that wasn't part of any committee or officer mandate. Accept that and get back to being strategic as soon as you reasonably can. It's a detour not a failure.

Then when you review Strategic Plan progress, or discuss an update to the Plan, talk about how you can avoid having that type of operational work come back to the board table in future.

### ***Summary***

A 'working' board still gets to choose which work it will do, and which it will delegate. Operational work can be delegated. Strategic work, such as setting priorities and articulating values, cannot be. If the board doesn't make time for governance and strategy, a great many good-hearted, hard-working volunteers will waste some of their time and effort on conflicting priorities or less critical tasks. The more limited your resources, the more important it is that you use them very wisely.

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