

» Module 5 - Continuous Learning

Continuous Learning

Congratulations! You have:

- Examined your goals and motivations as a non-profit board member
- Learned about your board's role and the charitable environment in which it operates
- Gained an awareness of your board's accountabilities
- Become familiar with the processes and practices through which your board can effectively fulfill its role and responsibilities.



Yes, you are a knowledgeable board member now. But although you have come this far, the learning is not finished. As you go forward with your board responsibilities, the learning should never end. Your board commitment includes a dedication to:

- Ongoing evaluation of the board's performance and of your performance as a board member
- Continuous learning and development
- Leadership development
- Seeking out a range of learning resources.

So give yourself a well-deserved pat on the back for all that you have learned, and then move on to learn more through evaluating the performance of the board and individual board members.

Board Evaluation

An important part of the learning cycle of any organization or individual, including non-profit boards and board members, is taking time out for evaluation. Regularly assessing the performance of the board and its individual members can:



- Improve performance
- Encourage accountability and task completion
- Act as a motivator
- Identify required changes and potential new initiatives
- Refocus efforts
- Pinpoint training and support needs
- Recognize and reinforce success

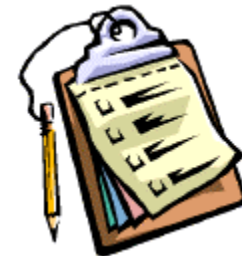
Whom and what does the board evaluate?

Your board will benefit by evaluating all the individuals, groups and activities associated with its work. Specifically, your board should be assessing:

- **The overall effectiveness of the board**
Conduct an annual evaluation of the performance of the board as a whole. This can be accomplished by surveying board members or by using external evaluators. The results of the annual board evaluation should be compiled into a report, together with recommendations for addressing any concerns identified. This report should be presented for discussion at a board meeting.
- **The effectiveness of meetings**
At the close of a meeting, have participants and the chair briefly evaluate the success of the meeting. The evaluation should identify what was productive and what was unproductive, as well as suggestions for improvement. The feedback can be provided to the chair and summarized for participants. Alternatively, an objective observer could conduct the meeting evaluation. Meeting evaluation should be done on an ongoing basis.
- **The performance of individual board members**
Individual performance evaluations for officers and all other board members should be done at least annually. This can be accomplished through self-assessment exercises and/or individual feedback meetings with the board chair.
- **Committees**
As with the board, a committee should also evaluate its effectiveness as a team, the success of its meetings and the performance of its members.
- **The organization as a whole**
The board should ensure that necessary evaluations of the organization's operations such as programs, financial performance as human resources are conducted regularly. Results of these assessments can then form the basis of board planning and goal-setting.

Evaluation criteria

A number of tools might already exist that can act as a starting point for your board's evaluation criteria. For instance, the mission statement, strategic plan, goals and objectives, governance model description, board accountabilities, job descriptions, terms of reference, and statements of board members' personal goals can all be useful in evaluating the success of your board's efforts.



The Fundamentals of Effective Board Involvement

In conducting evaluations, it is important to assess not only what was achieved, but also how it was achieved. A board that achieves its financial goals, but alienates its volunteers and staff in the process, for instance, is not an effective board. Conversely, a board that focuses on ensuring full consensus is always achieved, with little regard for the outcomes of their decisions, may also miss the mark.

Who is responsible?

It is the board President's responsibility to initiate evaluations, and usually the Nominating, Board Development, or Audit Committee's responsibility to coordinate evaluation activities. If your board does not have an evaluation process, then take responsibility for your own performance by doing a self-evaluation. You may also want to ask other board and committee members for feedback on your performance. This will help keep you motivated, focused, learning and aware of your personal effectiveness as a board member.

What comes next?

Don't forget the follow-up actions necessary to address any issues and needs identified in the evaluations. Your board should use evaluation results to establish new plans and goals. Then assign responsibility for these next steps, set time lines for accomplishing the next steps, and monitor progress towards your goals. This will ensure ongoing improvement in the work of your board and its members.

Just as evaluations need to be completed on a regular basis, so must board development be a continual activity. Let's explore some ideas for ongoing board development.

Ongoing Board Development

Your learning as a parent isn't over after you finish the pre-natal class. If you were becoming a lawyer, your legal knowledge would not be complete even once you pass the bar exam. Similarly, your training as a non-profit board member is not done after you have been through an orientation session, a course, or even after you have been on the board for a few years!



Continuous learning is essential to fulfilling any responsibility you take on in our complex, rapidly changing environment, including board membership. It provides you with the skills and knowledge you need to survive and keep pace with this environment. Ongoing development also keeps you challenged and motivated. It stimulates your creativity and builds your confidence and leadership abilities.

There are many ways your board can provide you and its other members with development opportunities. Here are just a few ideas:

- Board manuals
- Board retreats
- Workshops and in-service training
- A mentoring program, where more experienced board members support rookie members
- Board member evaluations
- Guest speakers, including staff, volunteers, service users or outside experts, presenting on areas of interest to the board
- Exposure to service delivery activities
- Assignments that offer variety and increased responsibility and challenge
- Articles, books, videos, internet resources
- Board member recognition, such as verbal acknowledgement, celebrations, awards, small gifts, thank you letters.

You are ultimately responsible for your own learning, so even if your board does not offer these development activities, create your own opportunities. Go on-line to find resources, share ideas and information with other board members, search libraries and bookstores for relevant materials, offer to take on a new board task, or talk to your local volunteer centre.

By pursuing ongoing board development you are growing as a board leader. Look now at developing your board leadership skills.

Leadership

As a non-profit board member, you are expected to be a leader. The board, in leading the organization, is expected to:

- Provide a vision for the organization
- Develop the plan and the resources necessary to achieve the vision
- Create an environment that inspires others to work together towards attaining the vision
- Fulfill its responsibilities in an ethical, accountable, effective and efficient manner.



How can you, as an individual board member, develop and exercise your leadership abilities and fulfill your leadership responsibilities? The opportunities are endless ... here are just a few ideas:

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| <ul style="list-style-type: none">• Chair a meeting• Seek out a mentor or be a mentor• Give a presentation• Take on a new responsibility• Think big, think positively• Consider the unthinkable• Do more than what was expected• Take a risk• Act ethically• Learn something new about your organization• Read books about leadership and leaders you admire• Attend leadership workshops• Organize an event• Give someone honest, constructive feedback• Offer someone encouragement and support | <ul style="list-style-type: none">• Solve a problem• Listen• Speak your mind• Stand up for your ideas and beliefs even if they are unpopular• State your expectations• Admit when you make a mistake• Confront a problem• Attend an organization function• Help someone out of a jam• Ask questions• Make the hard decisions• Delegate• Use your contacts• Make a donation• Trust and respect others• Follow through on your commitments |
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As you can see by this list, your effectiveness in leading your organization will be determined not by your charisma, genetics or special talents, but by the small, day to day things that you decide, do and say. We all have the potential to be leaders ... so why not seize upon an opportunity today to decide, do or say something that reveals the leader in you? In doing so, you might change a mind, a problem or an organization. You might even change a life.

To honor your successful completion of this training module, celebrate with Carlos and Debra.

Celebrate with Carlos and Debra

Well done, Carlos!

Thank you for all your guidance as I've considered whether to become a board member. I'm now feeling confident that I'm doing this for the right reasons, that I have the basic knowledge I need to be an effective board member, and that I can make a real contribution.

I'm pleased to report that I was elected to the board at the recent annual general meeting! I'll be continuing to sit on the Planning Committee, and I'll be sitting on an ad hoc committee that is advising a project to implement new computer network and data base systems. I know I still have a lot to learn, and I'll be consulting the additional resources listed in this course to help me as I go along.

Here's to lots of success in your future board endeavors!

Now, let's check on Debra's progress.

Celebrate with Carlos and Debra

Best wishes, Debra!

I owe you a debt of gratitude for all the great advice you've given me throughout the course. I now know that this board is the right place for me to exercise my leadership abilities. I'm now armed with more complete board knowledge to offer the organization. The ideas you've helped me to work on have really made my board a more effective team, too.

I'm excited to continue working with my board on the new ideas I've received through this training as I take on my new role as President! Yes, I decided to accept the nomination now that I'm feeling more optimistic about the board's potential and more secure with my knowledge and leadership abilities. Oh yes, and that job I've been after ... I was just offered a supervisory position with a local credit union. They told me that my board leadership experience was the deciding factor!

Congratulations on completing the course. May you and your board achieve your organization's mission!

Before you leave the online course, look over the list of resources which will help you further your preparation for becoming an effective board member.

Bibliography and Resources

Following is a list of resources the author found useful in creating this training module. You may also find these resources valuable as a starting place for your ongoing development as a board member. Additional resources may be found on the Mentoring Canada web.



Internet Links

Canada Customs and Revenue Agency:

<http://www.ccr-aadrc.gc.ca/tax/charities/menu-e.html> and
<http://www.ccr-aadrc.gc.ca/tax/nonprofit/menu-e.html>

explain the privileges and responsibilities of charitable and non-profit organizations under the Canadian taxation system.

Canadian Centre for Philanthropy:

<http://www.ccp.ca/>

is dedicated to advancing the role and interests of the charitable sector. The site includes information on trends and issues in the sector, and material from the organization's publications.

Charity Village:

<http://www.charityvillage.com/>

contains comprehensive information for the Canadian non-profit sector, including news, trends, articles, links to useful resources, learning opportunities, jobs, suppliers and more.

Internet Nonprofit Center:

<http://www.nonprofits.org/>

an American site that provides information aimed at donors, volunteers and nonprofit organizations. The site includes information on a wide range of topics of interest to boards and managers of nonprofit organizations.

The Management Assistance Program for Nonprofits, Free Toolkit for Boards:

<http://www.mapnp.org/library/boards/boards.htm#anchor585925>

an American site that contains numerous articles a wide range of nonprofit board topics, such as board roles and responsibilities, staffing the board, evaluating the board, and ensuring successful committees and meetings.

Maryland Association of Nonprofit Organizations:

http://www.mdnonprofit.org/sfex_intro.htm

offers standards of excellence for nonprofit organizations.

Minnesota Council of Nonprofits:

http://www.mncn.org/pnp_index.htm

provides standards of excellence for nonprofit organizations, as well as other nonprofit management resources.

National Center for Nonprofit Boards:

<http://www.ncnb.org/>

an American site that contains resources aimed at strengthening nonprofit boards of directors.

Panel on Accountability and Governance in the Voluntary Sector:

<http://www.vst-trsb.net/pagvs/>

documents the work of the Panel, particularly their report, Building on Strength: Improving Governance and Accountability in Canada's Voluntary Sector.

Voluntary Sector Roundtable:

<http://www.vsr-trsb.net/>

aims to strengthen the voice of Canada's charitable, voluntary sector, particularly in relation to governmental, legislative and regulatory issues impacting community organizations. This site offers several articles dealing with strengthening the sector's capacity and its relationship with the federal government.

Volunteer Canada:

<http://www.volunteer.ca/>

provides resources aimed at supporting volunteerism and civic participation in Canada, such as standards for volunteer screening and management, information on trends in the voluntary sector, and links to local volunteer centres.

Books, Manuals and Reports

Board Basics Manual for Leadership Development Programs, United Way of Canada-Centraide Canada, 1995. **Availability:** United Way of Canada-Centraide Canada. Code NS 860E

Board Basics for Volunteers, Participant's Manual, United Way of Canada-Centraide, 1995. **Availability:** International Tele-Film. Manual & 5 videos. Manual sold separately. Order #5297 (Manual)

Board Building: Recruiting and Developing Effective Board Members for Not-for-Profit Organizations, The Muttart Foundation and Alberta Community Development, 1997. **Availability:** Volunteer Calgary.

Board Development: Developing Job Descriptions for Board Members of Nonprofit Organizations, The Muttart Foundation and Alberta Community Development, 1997. **Availability:** Volunteer Calgary.

Board Development: Drafting and Revising Bylaws for Not-for-Profit Organizations in Alberta, The Muttart Foundation and Alberta Community Development, 1999. **Availability:** Volunteer Calgary.

Board Development: Financial Responsibilities of Not-for-Profit Boards, The Muttart Foundation and Alberta Community Development, 1997. **Availability:** Volunteer Calgary.

Board Development: Hiring and Performance Appraisal of the Executive Director, The Muttart Foundation and Alberta Community Development, 1998. **Availability:** Volunteer Calgary.

Building on Strength: Improving Governance and Accountability in Canada's Voluntary Sector, Panel on Accountability and Governance in the Voluntary Sector, 1999.

Executive Leadership in Nonprofit Organizations: New Strategies for Shaping Executive-Board Dynamics (The Jossey-Bass Nonprofit Sector Series)

by Robert D. Herman, Richard D. Heimovics (Contributor)

(March 1991) Jossey-Bass; ISBN: 1555423345

Availability: www.josseybass.com

Managing for Accountability: Preserving the Public Trust in Public and Nonprofit Organizations

by Kevin P. Kearns, (March 1996) Jossey-Bass; ISBN: 0787902284

Availability: www.josseybass.com

About the Author: Sherry Ferronato

Sherry Ferronato's experiences with boards over the past twenty years have convinced her of the impressive impact that a small group of dedicated leaders can have. She has enjoyed contributing to boards in many capacities, including as a board member, a committee volunteer, an agency reviewer, a non-profit staff member, an Executive Director, and now as a consultant.



Sherry currently works in her own Calgary-based consulting practice, specializing in such areas as, organizational, board and program development, mentoring, mergers and leadership. Before establishing her consulting practice, she led Big Sisters and Big Brothers of Calgary and Area for over eight years, as a Co-Director and later the Executive Director. Prior to this, she was the Executive Director of Aunts at Large, one of the three organizations that merged to form Big Sisters and Big Brothers of Calgary and Area. Sherry has also held a variety of other non-profit, public and private sector positions.

Sherry's educational background is in Social Work, having completed her Bachelor of Social Work degree at the University of Western Ontario, and her Master of Social Work degree at the University of Toronto.

Sherry was honored to receive a Muttart Foundation Fellowship Award in 1998. Her Fellowship project involved writing articles on a number of issues of current concern to the charitable sector, such as the impact of the New Economy on charities, non-profit mergers, demographic trends, and accountability in the sector.

If you would like to speak with Sherry, she can be reached at Ex Animo Consulting, (403) 275-1013, exanimo@telusplanet.net.

Sponsor: Big Brothers Big Sisters of Canada

<http://www.bbsc.ca/>

Big Brothers Big Sisters of Canada is a national organization comprised of 190 member agencies servicing more than 300 communities across the country. Each Big Brother/Big Sister agency provides direct service to children by matching adults and children in quality mentoring relationships. The agency staff members are experts at screening volunteers and matching them with a child having similar interests.

The national organization provides services and programs to member agencies to assist them with their hands-on work with parents, children, and volunteers. Ranging from staff training workshops to Big Brothers Big Sisters' leading Child Safety Program, which includes an emphasis on sexual abuse prevention, the organization works diligently to ensure that program quality is superior in all parts of the country.

Web Design and Implementation: Web Foundations

<http://www.webfoundations.com/>

Web Foundations provides a variety of services including website design and development, online training webs, original graphic design, website maintenance and document conversion, consultation and strategy planning for external and internal webs (intranets), and software training.