



GUESTS IN THE BOARDROOM

Arab-American writer, Khalil Gibran (1883-1931) wrote "If it were not for guests all houses would be graves". The sentiment may seem to be a bit extreme, but speaks to the idea of isolation from the world. I wonder if there is a message here for non-profit board "houses"?

There are some thoughtful writings on the pros and cons of open meetings, meetings that can allow members or even the public to attend.¹⁾ In the USA some states have passed legislation requiring non-profits to have open meetings in some circumstances. For a Canadian perspective on open meetings see [Elizabeth McFaul, The Case for Open Board Meetings, Imagine Canada Blog, June 28, 2016](#). Her article provides an example of a open meeting policy. Here is another from [Baycrest Health in Ontario](#) And, it is not unusual for boards to seek external expertise on specific issues. Asking a lawyer, accountant²⁾ or governance consultant to a meeting is a relatively commonplace occurrence in the life of a board.²⁾ Most boards want to hear directly, not through their Executive Director or CEO, from their auditors and their their lawyers. Fundraising and HR consultants and marketing expert and and governance consultants are the most common categories of invited boardroom guests. Even where some of this expertise resides on the board, there is value in hearing an impartial perspective even if the advice received does not affect the outcome of a decision.

From my experience non-profit boards can easily become insular in their outlook, focused as they often are on their fiduciary responsibilities. Even strategic work can be blinkered when it serves to protect or enhance the organization. Might guests, either friends or compatriots, have a role to play in insuring that those governing have a good view of the landscape beyond the boardroom?

What and What Not

This post focuses on the value that guests from away, occasional visitors to the boardroom, can be to a leadership team. And, it is about boards and executive directors extending an invitation and acting as hosts for their organization. Good governance includes the extension of hospitality to others.

This post is not about boards consulting before making a decision or incorporating previously unheard voices into their deliberations. These kind of actions too are important, certainly with growing interest in more inclusive ideas of governance.³⁾ See for instance Chao Guo article [The Road Less Travelled: establishing a Link Between Nonprofit Governance and Democracy](#) Those seeking

ideas about staff or client involvement at the board level can find help elsewhere too.”⁴ The issue of staff other than the executive director attending board meetings or interacting with the board is controversial one. Jan Masaoka’s post on staff-board interactions in [Blue Avocado](#) offers some very useful guidelines. The topic of client involvement in governance is frequently raised by nonprofits working to serve people with disabilities. Here is an good one from the [Georgia Centre for Nonprofits](#).

I am deliberately using the word “boardroom” to convey that governance work can involve employing the space used for board business meetings for other kinds of conversations. Boardroom guests invite a change in the household routine.

A Subtle Idea

When I was researching the topic of ex officio board members, the subject of two earlier posts, I came across a 2008 article by Richard Osborn entitled “Why ex officio board members and invited guests are essential”.

Osborn, then the president of Pacific Union College in California and Executive Director of the Association of Adventist Colleges and Universities, was writing about the important role of these two groups of players in the governance of Adventist schools.⁵ Richard Osborn, [Why ex officio board members and invited guests are essential](#) *Journal of Adventist Education*, Summer 2008, pp 20-23. Adventist, or 7th day Adventist, schools are private Christian schools in the USA and Canada. There are approximately 20 K-12 Adventist schools across Canada. In the USA there are many more as well as more than a dozen private Adventist colleges and universities

Osborn said that external ex officios and guests can help remind an organization that they “are part of something bigger than themselves”. I had not really considered, as Osborn suggests, that boardroom guests might have special role. Perhaps it not a grand addition to the practice of non-profit governance but it I thought it to be an useful idea to share and and maybe an easy one to act on.

It is about cultivating perspective

The idea of inviting guests is about helping develop the board’s perspective on how their organization fits into the larger social, political and economic world. Guests, acting in this context are not needed as experts on a particular issue. They are invited to stimulate and help paint a picture of the broader community.

Inviting guests to board meetings, especially those who can help connect the organization to a broader purpose, involves an attempt to move beyond governance as the exercise of organizational sovereignty. The type of conversations I am speaking about are ones about vision. Vision, which most nonprofits have articulated, are normally bigger than a single organization.⁶ For a useful description of the difference between vision and mission see the nice two-page [Mission vs Vision](#) resource from BoardSource. The importance of mission gets all the attention. It is the property of the organization. Vision is what connects it to the community. Engaging with one’s vision is a way of understanding what Ryan, Chait and Taylor refer to as the generative work of boards in their 2004 book [Governance as Leadership, Reframing the Work of Nonprofit Boards](#).

David Renz of the Midwest Center for Nonprofit Leadership at the University of Missouri builds on this idea. In his 2013 Nonprofit Quarterly article [Reframing Governance II](#), he points to the role boards might usefully play as convenors of community conversations. The idea of inviting a guest or two into the boardroom is intended to open this door a little.

The idea that boardroom guests might add value to a broader conversation challenges the idea that board members collectively bring big picture expertise to the organization. They often don’t and even if it is present around the board table, it seldom is explicitly the subject of collective deliberations. In a similar vein, executive directors likely have some big picture ideas too, but their loyalty to the organization can get in the way.

One other thing gets in the way of having conversations that take one out of the organization, figuratively speaking. It is the pressure for board work to be decision-focused and actionable. Cultivating a broader perspective will not satisfy more instrumental impulses.

I want to suggest too that the effect that boardroom guests can have on a conversation is as much about their presence in the boardroom as their particular contribution to the dialogue.

Who to invite?

I am not sure how important it is for a board to dwell long on who to invite. Every nonprofit has external stakeholders that include funders, government officials, and other non-profits in their sector. Some may have an academic research centre in their community that studies the the kind of work they do.

It is probably best to look at personalities not just categories and ask who is interested in our kind of work and has a broad understanding of our environment? Consider someone from a sister organization, from a funder or from a government public policy unit.

Volunteer board members are not often directly acquainted with their organization's external stakeholders. That is too bad, but this is an opportunity to change this just a little. An executive director or other staff member will likely have interactions with stakeholders on a regular basis and have names of prospective visitors to offer. In all likelihood the idea of a guest session will likely involve the exploration of territory that is new for them too.

Tips on being a good host

Most people know what is involved with being a good host. Here are some thoughts though, rooted in very little experience so far, on how to turn the idea of a guests in the boardroom into an actual special governance meeting.

1. *How often might we host such a meeting?*
 - Once a year is plenty, or less often if the board's composition has not changed dramatically
2. *How many people should we invite as guests?*
 - Two or three, or four at the most, unless you decide that this is an opportunity to organize and convene a larger community forum
 - Consider inviting the board chair from a sister group if its executive director is the guest who first comes to mind.
3. *Who should extend the invitation?*
 - The board chair or the chair and the executive director together
4. *Should we offer food and drink?*
 - Yes! A breakfast, lunch or dinner session cannot fail to interest everyone and be social as well as educational
5. *How long a session might be needed?*
 - Two hours at least, three if there is meal involved (setting up, serving and cleaning up will take a chunk of time itself.
6. *Who should facilitate the meeting?*
 - The board chair of your organization.
7. *Should notes be taken?*
 - Brief notes of some highlights of the conversation are a good idea especially if they are sent out as part of a formal thank you to all.
8. *What are some possible questions? I would suggest the board spending time on the questions to guide the inquiry but not with the intent of answering them all in turn. Perhaps the questions can serve to create interest in the session but once people are together they might be collectively reframed to consider to get the conversation rolling?*
 - What is our vision for our community or sector/industry?
 - Do we see innovation in our industry and if so where? If not, why?

- What challenges and opportunities do we see on the horizon?
 - Are changes in our community's demographics that will affect the work we do?
 - What about changes in other sectors that will impact us?
9. *Should the questions be sent out in advance?*
- Yes
10. *Should our board and executive director be expected to prepare some notes?*
- Yes. It might even be good for the host board to divide up the questions and/or for members to have spent some time seeing what they can discover about what is going on out there in the world of.....(fill in the blank).

Lets put out the welcome mat

So that is my case for the benefit of inviting, now and again, guests into the "house" that is the non-profit boardroom. Hosting a guest or two, once and awhile, is not just beneficial in connecting leadership to their vision, it is an easy and interesting change of routine. Such a session may even have some "pay it forward" effects.

Are you ready to put out the welcome mat and plug in the kettle? Perhaps you already have. If so, I invite you to share your own insights.

References

1. ↑ In the USA some states have passed legislation requiring non-profits to have open meetings in some circumstances. For a Canadian perspective on open meetings on see [Elizabeth McFaul, The Case for Open Board Meetings, Imagine Canada Blog, June 28, 2016](#). Her article provides an example of a open meeting policy. Here is another from [Baycrest Health in Ontario](#)
 2. ↑ Most boards want to hear directly, not through their Executive Director or CEO, from their auditors and their their lawyers. Fundraising and HR consultants and marketing expert and and governance consultants are the most common categories of invited boardroom guests. Even where some of this expertise resides on the board, there is value in hearing an impartial perspective even if the advice received does not affect the outcome of a decision.
 3. ↑ See for instance Chao Guo article [The Road Less Travelled: establishing a Link Between Nonprofit Governance and Democracy](#)
 4. ↑ The issue of staff other than the executive director attending board meetings or interacting with the board is controversial one. Jan Masaoka's post on staff-board interactions in [Blue Avocado](#) offers some very useful guidelines. The topic of client involvement in governance is frequently is raised by nonprofits working to serve people with disabilities. Here is an good one from the [Georgia Centre for Nonprofits](#).
 5. ↑ Richard Osborn, [Why ex officio board members and invited guests are essential" Journal of Adventist Education, Summer 2008](#), pp 20-23. Adventist, or 7th day Adventist, schools are private Christian schools in the USA and Canada. There are approximately 20 K-12 Adventist schools across Canada. In the USA there are many more as well as more than a dozen private Adventist colleges and universities
 6. ↑ For a useful description of the difference between vision and mission see the nice two-page [Mission vs Vision](#) resource from BoardSource
 7. ↑ I would suggest the board spending time on the questions to guide the inquiry but not with the intent of answering them all in turn. Perhaps the questions can serve to create interest in the session but once people are together they might be collectively reframed
-

no comments

**WRITTEN BY GRANT MACDONALD**

Grant MacDonald is a former Associate Professor at Dalhousie University in Halifax, Nova Scotia, Canada. For more than two decades, Grant has provided workshops, courses and print resources to a variety of small and medium sized non-profit organizations. Helping volunteer boards and executive directors to govern with purpose, passion, intellect and humour continues to engage and challenge him.

[← EASY BOARD HOME IMPROVEMENTS](#)[BOARD SECRETARY: SUPERPOWERS REVEALED →](#)

This site uses Akismet to reduce spam. [Learn how your comment data is processed.](#)