

The Art of Trusteeship

The Nonprofit Board Member's Guide to Trusteeship

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Chapter 1: Establishing the Organizations Mission

One of the board's most important responsibilities is to establish the mission of the organization, to monitor the organization's progress in achieving that mission, and to review the mission periodically and revise it when necessary.

The board of directors of a nonprofit organization is first and foremost responsible for establishing the mission and monitoring the organization's progress in achieving that mission. If the organization is working toward other ends, the board should see that either the original mission is pursued or a new mission is set. If the organization (or another organization) accomplishes the mission or if the mission becomes irrelevant, the board should disband the organization or adopt a new mission. There are many well-known organizations--such as the Camp Fire Girls, the March of Dimes, and the YMCA--that have modified their missions or changed them dramatically.

Establishing and monitoring the mission of the organization is the board's most important responsibility. Diverse experts on nonprofit governance agree on this point. John Carver, an influential board consultant, writes: "The most important work of any governing board is to create and re-create the reason for organizational existence. This is not simply the approval of a purpose statement. Nor is this a task once done, then forgotten. It is a perpetual obligation, deserving of the majority of board time and energy. It is far more important than any other board undertaking, including budgets, personnel issues, risk management, and even choice of chief executive" (1990, p. 56).

Management guru Peter Drucker argues that this focus on mission is what distinguishes nonprofits from for-profit businesses: "The businesses I work with start their planning with financial resources. The nonprofits start with the performance of their mission" (1989, p. 89). We agree with these writers and have for this reason placed responsibility for mission first.

To fulfill its responsibility for the organization's mission, the board should

- Establish the mission of the organization.
- Ensure that the mission is clearly articulated.
- Ensure that everyone, particularly every trustee, understands and supports the mission.
- Monitor the organization's progress toward achieving its mission.
- Modify the mission when necessary and appropriate.

Establishing the Organization's Mission

The mission of an organization conveys what it is and what it hopes to accomplish. It provides purpose and direction to staff and volunteers, uniting them in a common effort. Robert Greenleaf, social critic and long-time student of organizations, has written: "[The mission is] the overarching purpose, the big dream, the visionary concept, the ultimate consummation which one approaches but never really achieves. It is presently out of

reach; it is something to strive for, to move toward, or become. It is so stated that it excites the imagination and challenges people to work for something they do not yet know how to do, something they can be proud of as they move toward it" (1991, p. 9).

Without a well-defined mission, an organization will most likely drift along, reacting to suggestions and complaints from organizational members and shifts in the external environment. Without the foundation of a clear mission, poor decisions and no decisions will be made and planning is all but impossible. The board of directors of a nonprofit organization is responsible for establishing the mission, that is, for deciding to what ends they will devote their efforts and resources. Trustees need to address such fundamental questions as

- What is the purpose of this organization?
- What do we want to change in the lives of our members or clients?
- What values, beliefs, and assumptions do we bring to this work?
- What is our experience, our history?
- What are our strengths and limitations?
- What are our resources?
- What programs or services should we provide?
- Whom should we serve?

Although immediate crises may seem more compelling and day-to-day matters less theoretical, effective boards take a long view, setting time aside for trustees to think about the past and the future as well as current operations. Trustees need to reflect on the organization's history and values, the community it serves, and the programs it offers. In the words of Susan Wisely, trustees must be "historians" and "prophets" as well as fiduciaries (Tyler Scott, 1997, p. V-13).

The questions just listed are addressed for the first time at the birth of an organization. But establishing the mission is not something a board can do once and then move on to other tasks. The mission should be reviewed regularly and changed, as needed. Ensuring That the Mission Is Clearly Articulated The board is responsible for both establishing and communicating the mission of the organization. One way to ensure that the mission is clear is to write a mission statement to be shared with everyone. Before a mission statement can be developed, the board must first have a clear understanding of the mission. This sounds obvious, but we have seen organizations attempt to write a pithy mission statement when they were still unclear about the mission itself.

The mission statement should state the purpose of the organization, describing not only what the organization does and whom it serves but also what it is trying to change. Good mission statements present an image of the world as the organization would like it to be, focusing on outcomes (such as eliminating hunger) rather than means (providing free lunches). The best mission statements are clear, concise, and inspiring but meaning should not be sacrificed to brevity or clever wording.

All trustees--indeed all employees--should be able to articulate the mission of the organization. The shorter and simpler it is, the easier it will be to remember, even under fire. Some organizations write both a long and a short version of their mission statement. The former is a working statement used to guide board decisions, whereas the latter is used primarily for public relations. Many organizations give trustees and staff members copies of the mission statement. Some print it on their business cards, letterhead, and brochures.

The following are some examples of mission statements:

American Diabetes Association: To prevent and cure diabetes and to improve the lives of all people affected by diabetes.

Educational Testing Service (ETS): To provide educational leadership that identifies talent, creates opportunity for all learners, and serves the public good.

Indianapolis Museum of Art: To enable a large and diverse audience to see, understand and enjoy the best of the world's visual arts; to this end, the museum collects, preserves, exhibits and interprets original works of art.

Offender Aid and Restoration (OAR), Tompkins County, New York: To ensure that all members of our community, regardless of race, gender or economic status, obtain equal justice before the law.

Virginia Historical Society: To collect, preserve, and interpret the commonwealth's past for the education and enjoyment of present and future generations.

YWCA of the U.S.A.: To empower women and girls and to eliminate racism.

In talking with organizations about their mission statements, we found some people who had to look them up and others who could recite their organization's mission without hesitation. One clerical worker who answered the phone at a local Planned Parenthood office explained that she remembered the mission statement because she had it tacked to the bulletin board above her desk so that she would keep in mind the purpose of her work.

Ensuring Everyone--Particularly Trustees--Understands and Supports the Mission

Everyone in the organization--and ideally, beyond--should have the same understanding of the organization's mission. When board or staff members see the mission differently, they may work toward different ends or even at cross-purposes. Even though it is the board that adopts the mission, everyone in the organization should talk about it. The mission should be discussed during board recruitment and staff selection, board and staff orientation, board and staff retreats, and all assessments of the board and staff. Being able to clearly articulate the mission is essential to successful fund development efforts as well.

A clear mission is critical to building a cohesive board. After interviews with groups of experienced trustees, Cyril Houle concluded that among the qualities present in boards that have outstanding group spirit, "[m]ost important of all [is that] the board members share a clear understanding of and commitment to the mission of the agency" (1989, p. 123).

Although the importance of shared commitment may seem obvious, many organizations recruit trustees without ensuring that individual beliefs fit organizational values. We have seen trustees of a girls' advocacy organization who did not believe that girls face gender discrimination, trustees of a community dispute resolution center with no understanding of mediation, and trustees of a drug treatment center embarrassed to have the name of the organization appear on the refreshment stand they were staffing to raise funds for the agency. These are not bad people or even necessarily bad trustees, but they are serving on the wrong boards. The nominating or board development committee can help an organization avoid such situations by discussing the mission during the recruitment of

new trustees. If, despite the best efforts of the board, it becomes apparent that a trustee's values are not congruent with those of the organization, he or she should consider resigning. **Monitoring the Organization's Progress Toward Achieving Its Mission** The board of directors is responsible for seeing that the organization carries out its mission, that its programs and services are doing what they are intended to do, and that the ends set out by the board are being accomplished. An effective board also ensures that the behavior of the organization is congruent with its goals and values. The board must ask itself if each and every new program and new policy fits the mission. For example, if the mission of an organization is to enable a large and diverse audience to see, understand, and enjoy the best of the world's visual arts, the board must carefully consider its policy on entrance fees. For vigilant trustees, How does this decision fit with our mission? is one of the most frequently asked questions.

In subsequent chapters, we discuss the board's responsibilities for strategic planning, financial oversight, program oversight, and advocacy. It is through meeting these responsibilities as well that the board monitors the organization's progress toward achieving its mission.

Modifying the Mission When Necessary and Appropriate

The mission of an organization is not something that can be set by the founders and then ignored. Things change in the world, sometimes dramatically. Decades ago, polio vaccines eliminated the need for the original March of Dimes, and that organization then chose a new and different mission: preventing birth defects and infant mortality. Many organizations modify or gradually stray from their original mission by offering new services or serving new clients. A visitor to the local YMCA will find swimming lessons, after-school programs, basketball leagues, and yoga classes. Few YMCAs today provide housing, as they once did, or opportunities for young men to meet for Bible study. Under revised names, Boys Clubs of America now serves girls, and the Campfire Girls now serves boys. Our local Planned Parenthood clinic provides services for menopausal women, and the local group home for adolescents administers the county's foster care system.

The board is responsible for periodically revisiting the mission to make sure the organization is pursuing the right ends and that the ends it is pursuing are related to the mission. For example, if the mission of an organization is to empower women and girls, and the organization is considering opening an after-school program for elementary school boys and girls, it needs to reexamine its mission. When programs or decisions are not congruent with the mission, trustees should ask themselves if the program or decision is the wrong one or if the mission should be changed. Any change in the mission must be accompanied by extensive deliberation by the board. Even though it is tempting to both staff members and trustees to add services because the need is there or because funding is available, the board should not allow the organization to drift into unrelated program areas or slide into a new and different mission. The board is responsible for ensuring that everything the organization does and says--its programs and services, policies and pronouncements--are in line with its mission.

Board Assessment Questions Related to the Mission

1. Does our mission statement convey the outcomes we hope to achieve?
2. Are the programs and services we offer consistent with our mission statement?
3. Do all board and staff members understand and support the mission?

