

# **CULTURAL COUNCIL OF GREATER JACKSONVILLE BOARD OF DIRECTORS**

## **BOARD SURVEY AND RETREAT REPORT**

December 2, 2019

Prepared by the Nonprofit Center of Northeast Florida

### **Introduction**

The Cultural Council of Greater Jacksonville Board of Directors engaged the Nonprofit Center to conduct a board training and facilitated dialogue at their retreat on November 19, 2019. The goal of the session was to build strong relationships and connections among board members, as well as ground the entire group in board governance best practices and “plan to plan” for the next phase of the organization.

The Nonprofit Center facilitated a custom training and discussion on board roles and responsibilities and evidence-based governance practices, as well as a facilitated activity to help the board transition into a “planning to plan” mode. The below is a summary of the agenda and discussion.

If you have any questions about this report, please contact the facilitator, Deirdre Conner, at [dconner@nonprofitctr.org](mailto:dconner@nonprofitctr.org).

### **Session Activities**

Goals set for the session were as follows:

- Understand the role of boards in the wider context, and what the research shows about effective boards
- Review basic and advanced roles and responsibilities that every board member needs to know
- Empower board members as ambassadors to better support the Cultural Council and its goals
- Feel inspired and excited about working towards the Cultural Council’s mission
- Develop a stronger understanding of board priorities and next steps

Following a business meeting, the board introduced themselves to one another and shared what they were most proud of about the Cultural Council. Executive Director Joy Young then shared a presentation about the role of a Local Arts Agency and the Cultural Council’s mission and direction.

The facilitator then gave an overview of the state of the nonprofit sector in Northeast Florida, and a briefing on best practices and research in the area of board governance, including board roles and responsibilities, characteristics of transformational boards and new governance thinking. The presentation slides are attached to this report.

The briefing concluded with a brainstorming with groups of participants to discuss the following questions: “What are the most difficult Board roles and responsibilities to execute? What are some practices that our board uses to help execute our roles & responsibilities effectively?”

The most difficult roles and responsibilities of the board were identified as:

- Hiring and firing the Executive Director
- Setting goals
- Making difficult budget decisions
- Fundraising and sustaining resources
- Understanding Sunshine Laws
- Continuing education and communication
- Financial reporting (operating vs everything else)
- Time constraints
- Active participation (board competency)
- Enhancing public standing and community representation

Effective practices identified by the group were:

- Having clearly documented roles and responsibilities
- Having a good setup for evaluating the performance of the organization, the board and the Executive Director
- Creating achievable and effective goals for the ED
- Continued education for the board on Sunshine Laws
- Board members showing up to meetings fully briefed and having read the materials
- Using effective tools for stronger board governance, such as board assessments
- Prioritizing board education
- Having open, honest, and respectful discussions, creating a “brave space”

Following additional content on effective governance practices (including several of the items surfaced in the exercise above), the group moved into a discussion of priorities and next steps.

For the “Rose, Bud, Thorn” exercise, each individual was asked to write down at least 1-2 distinct thoughts on different colored sticky notes. Each was to correspond to a category:

Rose = Strength

Bud = Opportunity

Thorn = Challenge

After each individual finished their sticky notes, everyone posted them on a white board, and then digested each category as a group. Following that, the facilitator worked with the group to rearrange the sticky notes into several distinct themes. The themes were as follows (with each sticky note attributed to one theme).

<b>Board of Directors</b>	<ul style="list-style-type: none"><li>• <b>Roses</b><ul style="list-style-type: none"><li>○ Board: Diverse and energized board slate</li><li>○ Diverse and engaged board of directors</li><li>○ Engaged board</li><li>○ Diversity</li></ul></li></ul>
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	<ul style="list-style-type: none"> <li>○ Maintaining culture of respect</li> <li>● <b>Buds</b> <ul style="list-style-type: none"> <li>○ Increase board engagement with CSG and arts community events</li> </ul> </li> </ul>
<b>Operations/Staff</b>	<ul style="list-style-type: none"> <li>● <b>Roses</b> <ul style="list-style-type: none"> <li>○ Creative and dedicated staff</li> <li>○ Experienced/seasoned Executive Director (local/national arts)</li> <li>○ Executive Director</li> <li>○ Talent pool</li> </ul> </li> <li>● <b>Thorns</b> <ul style="list-style-type: none"> <li>○ Poor financial structure and management challenges</li> <li>○ Lacking key performance metrics</li> <li>○ Small employee base but great deal of must-do tasks</li> <li>○ Organizational stability</li> <li>○ Retaining staff</li> <li>○ Staffing</li> </ul> </li> </ul>
<b>Government Relations</b>	<ul style="list-style-type: none"> <li>● <b>Roses</b> <ul style="list-style-type: none"> <li>○ CSG</li> <li>○ COJ backing</li> <li>○ Ability to use public funds to bridge arts with a higher quality of life</li> <li>○ Increase in CSG funding by \$2 million – includes emerging arts and organizations</li> </ul> </li> <li>● <b>Buds</b> <ul style="list-style-type: none"> <li>○ Have a seat in local/state government policy discussions impacting the arts</li> <li>○ City funding</li> <li>○ Increase positive relations with COJ (mayoral and city council)</li> <li>○ Support from COJ with increased funding to broaden grantee base and administration</li> <li>○ Advocacy</li> </ul> </li> <li>● <b>Thorns</b> <ul style="list-style-type: none"> <li>○ Political threats</li> <li>○ Politics</li> </ul> </li> </ul>
<b>Partnerships</b>	<ul style="list-style-type: none"> <li>● <b>Roses</b> <ul style="list-style-type: none"> <li>○ Partnerships</li> </ul> </li> <li>● <b>Buds</b> <ul style="list-style-type: none"> <li>○ Collaborating with other counties and expansion</li> <li>○ Well-positioned for strategic partnerships and sponsors</li> <li>○ Partnerships</li> </ul> </li> <li>● <b>Thorns</b> <ul style="list-style-type: none"> <li>○ Business based relationships; build then increase</li> </ul> </li> </ul>

<b>Community Engagement and Marketing</b>	<ul style="list-style-type: none"> <li>● <b>Roses</b> <ul style="list-style-type: none"> <li>○ Mission is warmly embraced by community</li> <li>○ Strong history of commitment to the arts</li> <li>○ Human need for the arts</li> <li>○ Incredible amount of potential</li> </ul> </li> <li>● <b>Buds</b> <ul style="list-style-type: none"> <li>○ Support of arts in community</li> <li>○ Making public more aware of cultural council's mission</li> <li>○ Expanded engagement with more arts agencies</li> <li>○ Greater positioning in Northeast Florida – influence</li> <li>○ Enhanced community awareness and support</li> <li>○ Ability to influence all art programs across diverse industries</li> <li>○ Focus responsibility for championing arts to specified special interests</li> <li>○ Maximize positive media coverage and relationships</li> </ul> </li> <li>● <b>Thorns</b> <ul style="list-style-type: none"> <li>○ “What does CCGJ do?” – community confusion on goal/purpose of our organization</li> </ul> </li> </ul>
<b>Revenue</b>	<ul style="list-style-type: none"> <li>● <b>Roses</b> <ul style="list-style-type: none"> <li>○ New revenue streams</li> <li>○ APP is significant revenue generator</li> </ul> </li> <li>● <b>Buds</b> <ul style="list-style-type: none"> <li>○ Possible opportunity for annual memberships to raise funds</li> <li>○ Increase private donations and sponsorships</li> <li>○ New funding sources/opportunities</li> <li>○ Nontraditional funding opportunities</li> <li>○ Revenue generating programs</li> <li>○ Sustainable revenue sources</li> </ul> </li> <li>● <b>Thorns</b> <ul style="list-style-type: none"> <li>○ Donor apathy</li> <li>○ Private donations</li> <li>○ Fundraising</li> <li>○ Funding challenges – need dedicated source</li> <li>○ Greater demand for shrinking pool of money</li> </ul> </li> </ul>

Following the themes discussion, the group had additional dialogue about the future. Each board member developed a vision statement for where they would like the organization and the board to be in January 2021, and shared with one another.

The session concluded with a recap of immediate follow up actions, which include:

- Nonprofit Center to send a follow up report, including presentation slides and roll up of notes.
- Nonprofit Center to add board members to its board newsletter to receive updates and resources going forward.

**Attachments:**

- November 19 PowerPoint
- Stand for Your Mission: Board Role



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# Governance for a Successful Organization

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Beyond Board Roles & Responsibilities

Cultural Council of Greater Jacksonville  
November 19, 2019

# Introductions

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Please share ...

- Your name
- How long you have been on the board
- What made you want to join the board
- One thing about the Cultural Council that makes you proud to be a board member

# Nonprofit Center Mission

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The Nonprofit Center **connects, strengthens** and **advocates** for a strong nonprofit community.

- Nuggets e-news
- Workshops & Trainings
- Job Posting
- Resource library, website
- Advocacy & Lobbying
- 3 information platforms
- 300 Nonprofit Members
- Staff Consulting
- Peer Convening Groups
- Community Coaches
- Board Bank
- Research

[nonprofitctr.org](http://nonprofitctr.org)



# Nonprofit Center *Stronger Nonprofits Framework*

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Operations



**Develop High-Performing  
Leadership Teams**



**Increase Access to Capital**

Mission



**Prioritize Organizational  
Learning and Impact  
Measurement**



**Strengthen External  
Awareness and Advocacy**

**Looking Inward**

**Looking Outward**

# Board Power

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There are more than 1.5 million nonprofits in the United States with an estimated 20 million board members at the helm.

**We do this work because we believe in something.**

# Nonprofit Center Resources for Boards

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- Online library
- Board Bank
- Nuggets E-News
- Board members newsletter
- Trainings: board and fund development, executive transitions, roles and responsibilities, and more
- Customized consulting, assessments and training specifically for nonprofit boards

# Today's Goals

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- Understand the role of boards in the wider context, and what the research shows about effective boards
- Review basic and advanced roles and responsibilities that every board member needs to know
- Empower board members as ambassadors to better support the Cultural Council and its goals
- Feel inspired and excited about working towards the Cultural Council's mission
- Develop a stronger understanding of board priorities and next steps

# Today's Agenda

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- Introductions
- Agenda, Goals and Norms
- State of the Sector
- Nonprofit Boards in the Wider Context
- Board Roles and Responsibilities
- Evidence Based Practices of High Performing Boards
- Planning to Plan and Next Steps

# Meeting Norms

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- What do you expect from yourself?
- What do you expect from others?
- What do you have to have in this setting in order to fully contribute?



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# Boards: Crucial to the Sector

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Nonprofit Boards  
in the Wider Context

# What is a Nonprofit Organization?

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- Serves a charitable purpose
- Advocacy restrictions
- Tax status, not a business model
- **Benefits the community**
- Can (and should!) make a profit that is invested back into the organization
- Operates in the areas of education, health, social assistance, the arts, religious and civic advocacy, and more



# Nonprofits: A Powerful Engine for Good

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- Represent **13%** of all jobs on the First Coast
- #1 Trusted source to take action on local issues
- **Second-largest employer** of the paid, private workforce in our community
- Are the **fourth largest** industry in the state of Florida

and yet ...

- **35%** of nonprofits operate in the red
- **86%** experienced increased demand for services in 2018
- **57%** say they can't meet demand

*Sources: State of the Sector 2019, Nonprofit Finance Fund, Florida Nonprofit Alliance*

# Northeast Florida's Nonprofit Sector

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Aggregate Revenue

**\$8.56 Billion**

Aggregate Assets

**\$7.33 Billion**

Employment

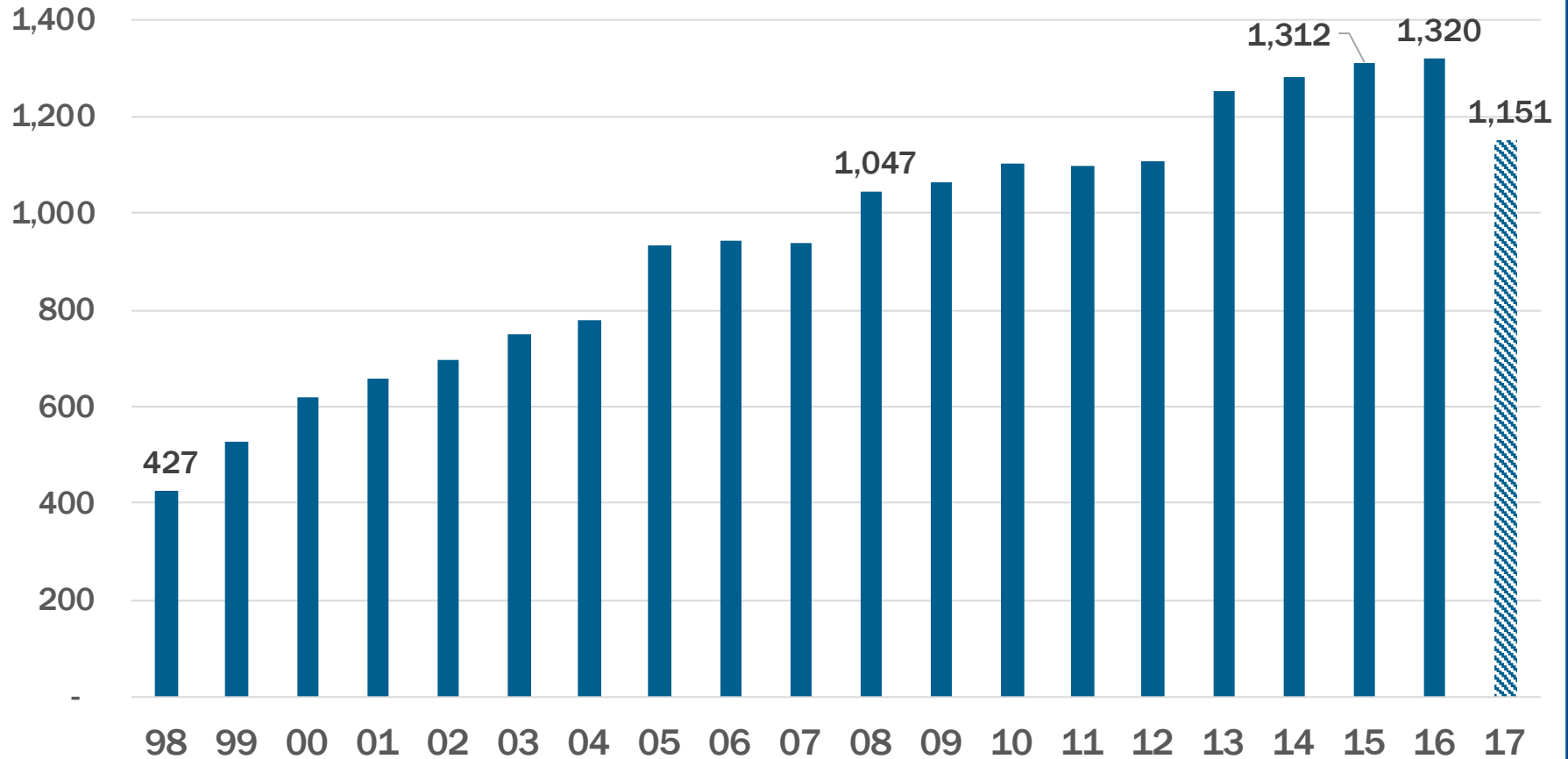
**72,188**

# State of the Sector 2019

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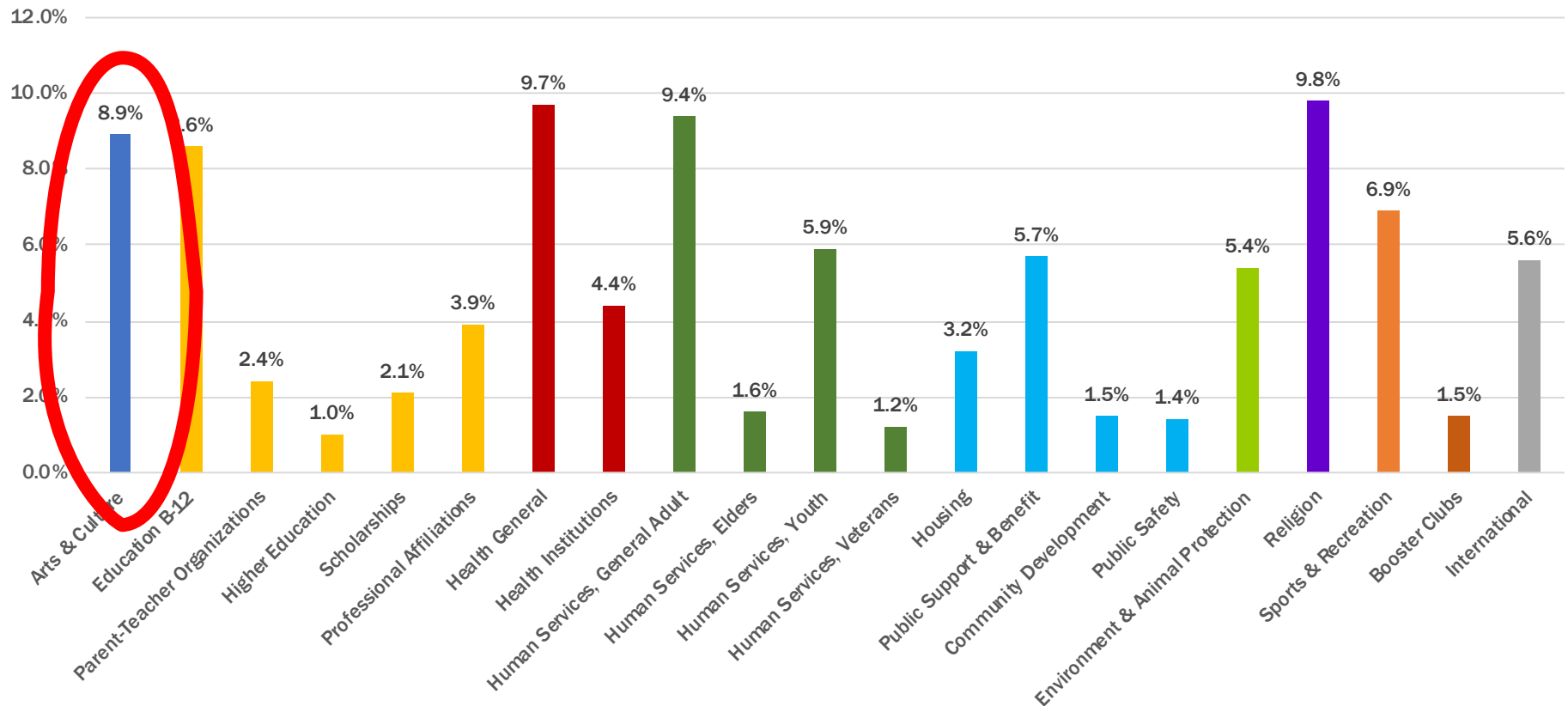
- Nonprofit organizations are a very diverse group.
- Though the sector is large, its heft comes from a very small group of entities. Most nonprofits are small.
- While contributions are an important income stream, nonprofits earn a large portion of their revenue.
- Charitable contributions are at or near pre-Recession levels, but there are 30,000 fewer donors and the impact of policy change is unknown.

# Filing Nonprofits on the First Coast 1998-2017



# Who Are These Nonprofit Organizations?

First Coast Nonprofits by Mission



# What Have We Added?

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■ Education B-12	51
■ Religion	44
■ Human Services General	38
■ Health General	33
■ Sports & Recreation	30
■ Arts & Culture	28

*(IRS exemptions granted after 2012)*

# How Are Organizations Funded?

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## National Data



## First Coast Nonprofits



Earned

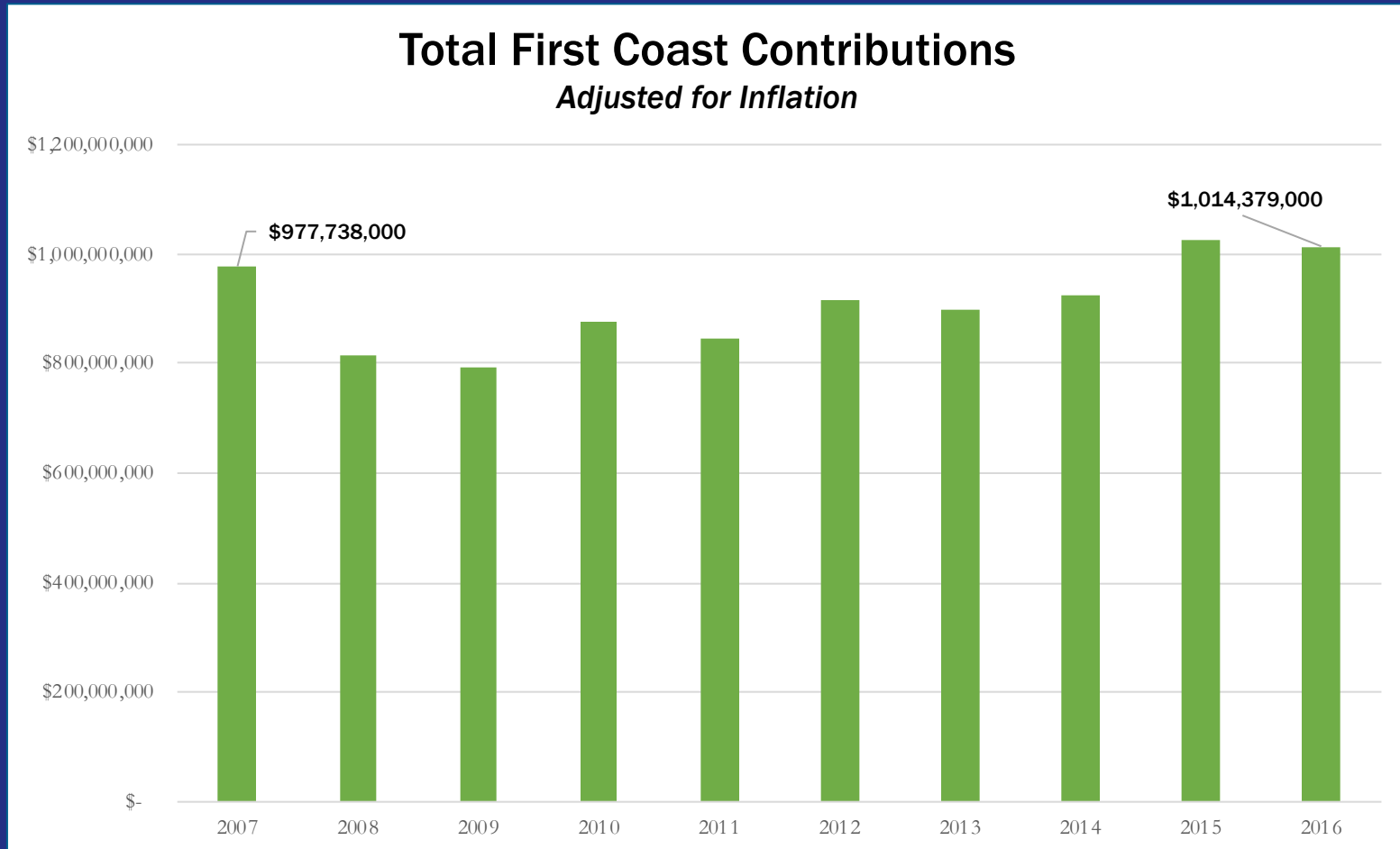


Government



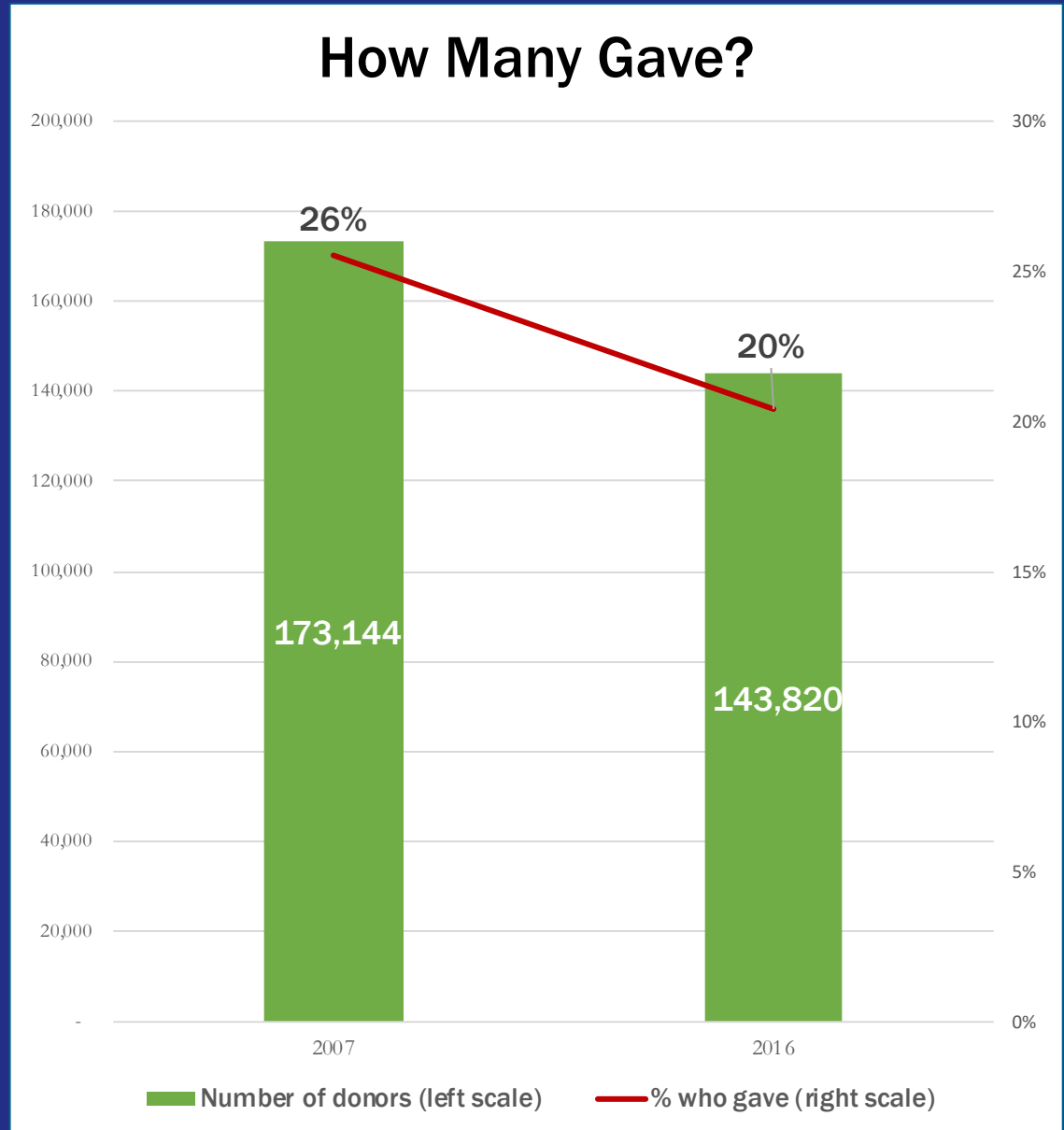
Contributions

# About Those Contributions ...

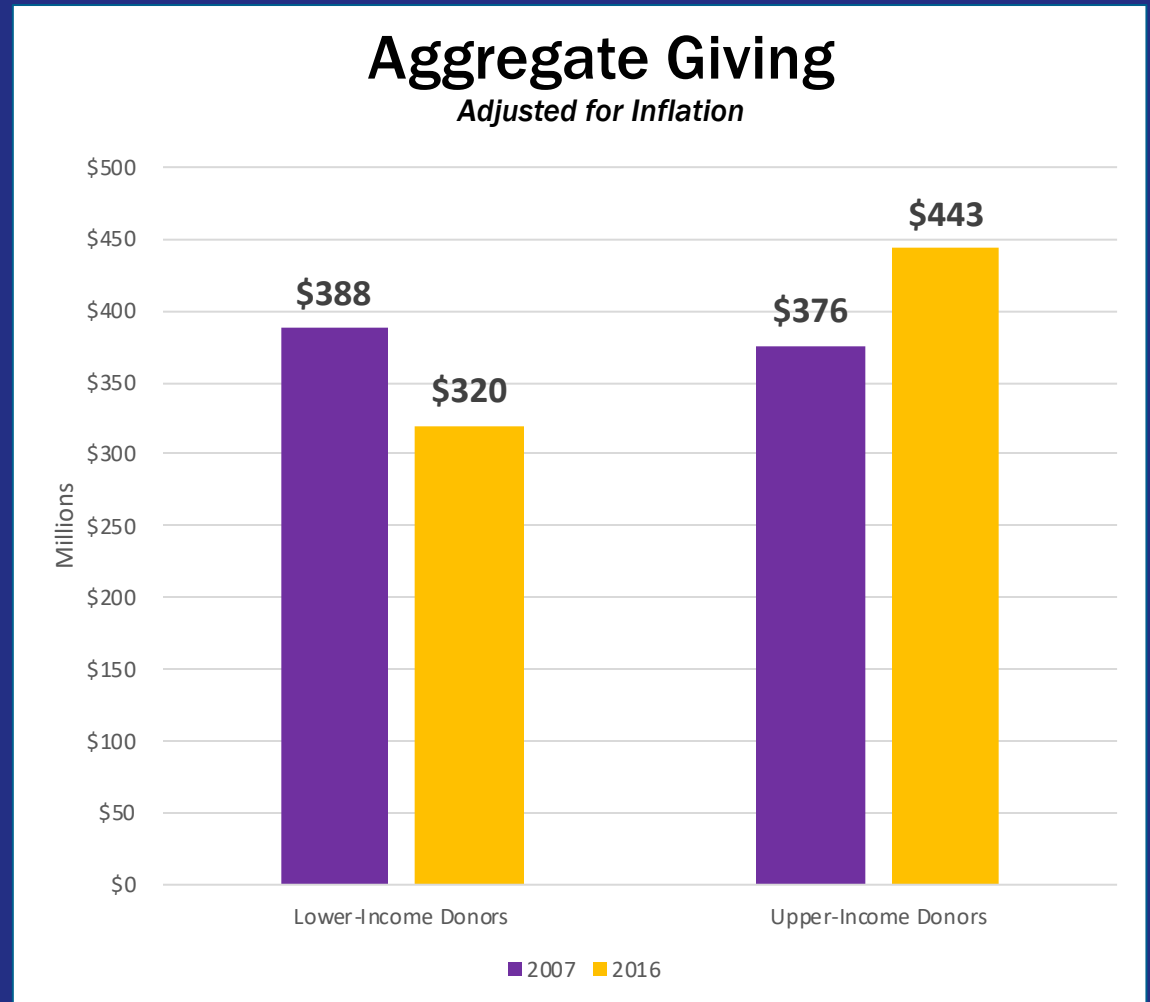




Gifts coming  
from a  
smaller pool  
of donors



Bulk of  
giving has  
shifted to  
upper-  
income  
donors



# Arts & Culture Organizations

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## Organizations

151

Employment

1,846 individuals

Total Income

\$100,620,332

Total Expenses

\$96,167,259

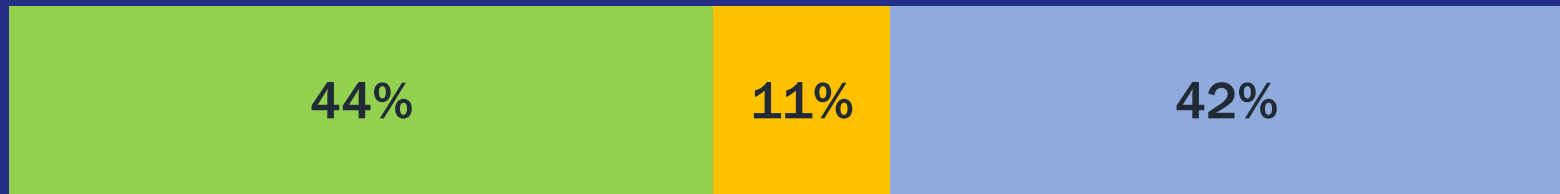
Net Assets

\$223,973,743

- 18% received their tax exemption after 2012
- 62% of the entities have reserves adequate to cover more than three months of operations
- Almost two-thirds of these organizations are in Duval County, and another 22% are in St. Johns County

# How Are Organizations Funded?

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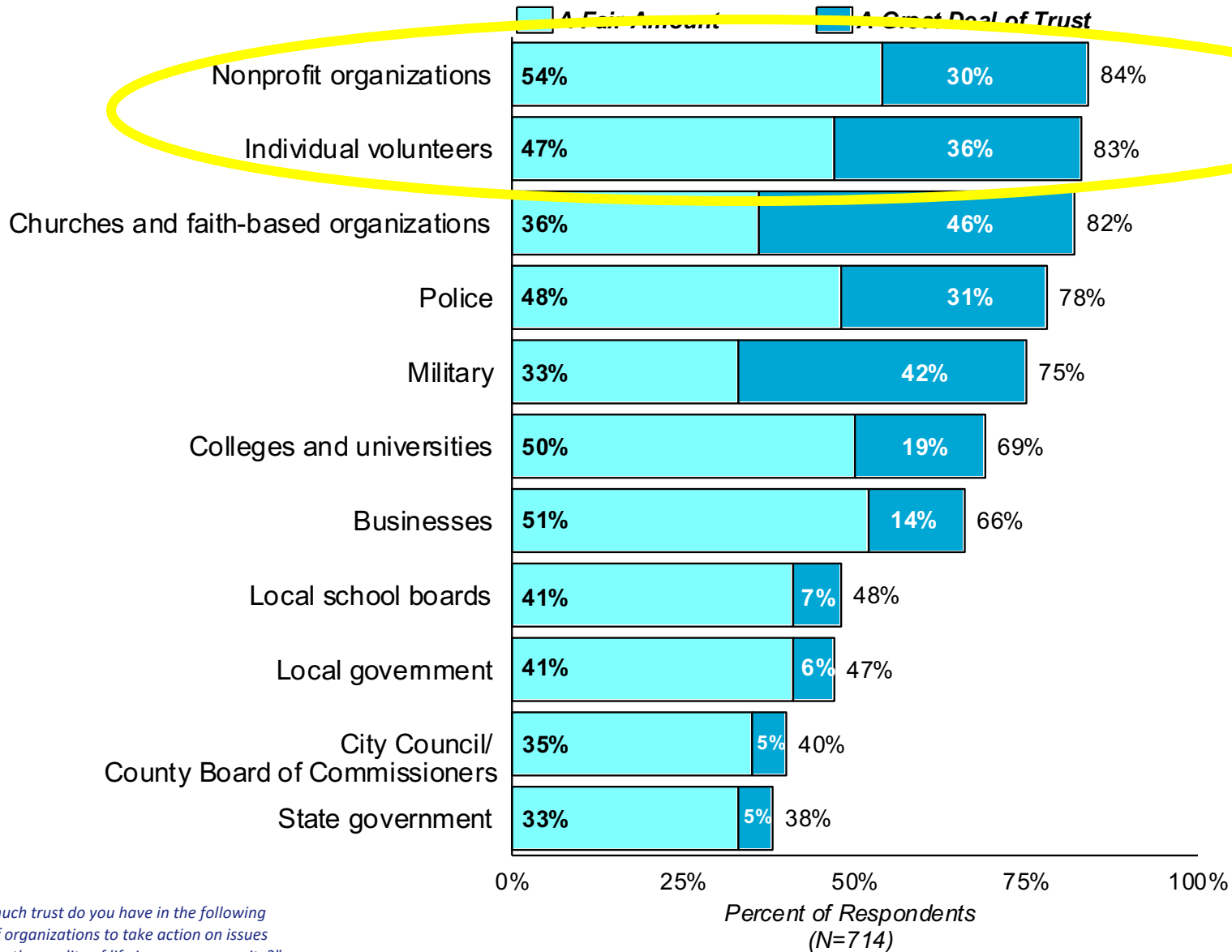


First Coast Arts & Culture Nonprofits



First Coast Nonprofits

# Public Trust in Organizations to Take Action on Issues



*"How much trust do you have in the following types of organizations to take action on issues affecting the quality of life in your community?"*



# Why Do We Need Boards?

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# Why Do We Need Boards?

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## **Legal**

- Checks and balances
- Democratic structure

## **Ethical**

- Community owned - informed voice and agent of the owners

## **Practical**

- Support and Advise – shared leadership with the CEO
- Perform
- Resources, including fundraising
- Advocate
- Plan

# Board Service: Legal and Fiduciary Duties

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## Duty of Obedience

- Obedience to the **organization's central purposes** must guide all Board decisions; it must also ensure that the organization functions within the law, and in accordance with its own bylaws and policies.

## Duty of Care

- Board members must exercise due care in all dealings with the organization and its interest. This includes careful **oversight of financial matters**, attention to issues that are of concern to the organization and **raising questions** whenever there is something that seems unclear or questionable.

## Duty of Loyalty

- Avoiding all **conflicts of interest**, including the appearance of conflicts of interest.



# Legal and Fiduciary Duties Plus One

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## **Duty of Transparency**

- Boards have an obligation to ensure that their organization is appropriately transparent in its operations.

# A Bit More About Fiduciary Responsibilities

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Board members don't need to arrive as experts, but they do need to work with the organization to ...

- Prioritize and invest in learning
- Get comfortable asking questions
- Including financial statements, budgets, audits, 990s and more in the board orientation process
- Consider continuing education segments of board meetings or retreats
- Determine the best structure for financial committees

# Board's Two-Way Responsibility

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Govern the organization as a group

AND

Support the organization as individuals

# Time, Talent, Treasure: Supporting the Organization As An Individual

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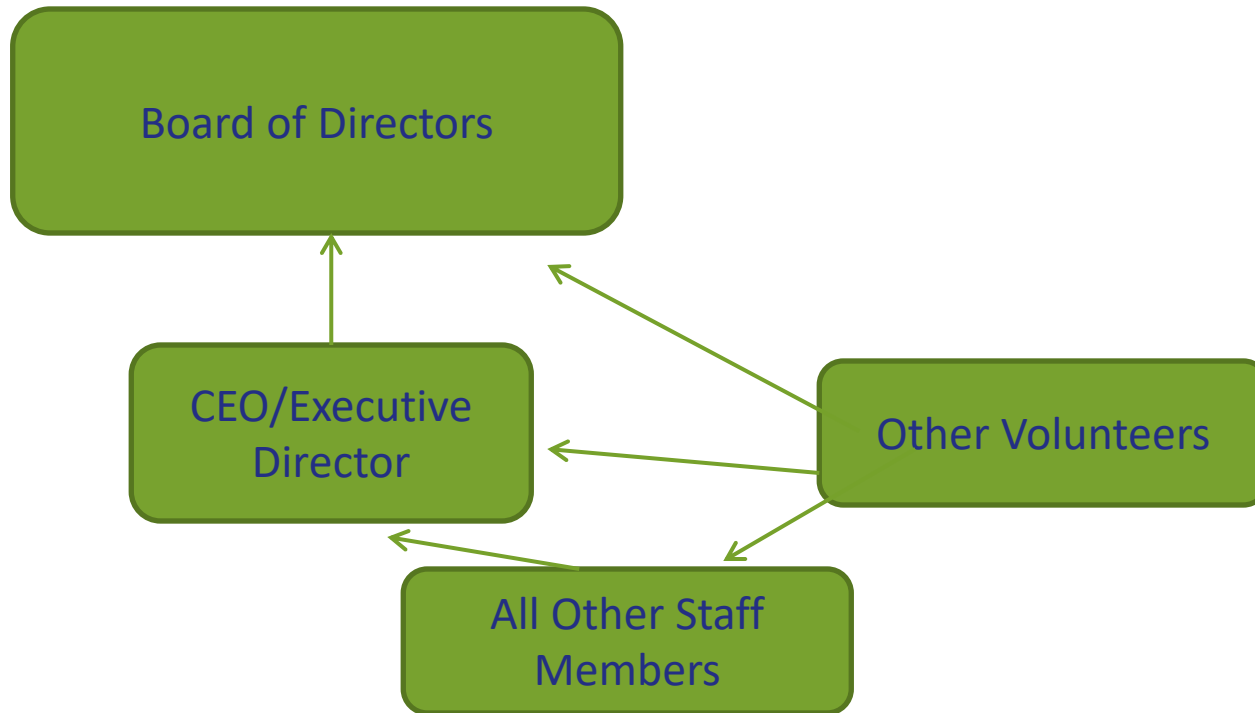
# Board Service: Core Roles and Responsibilities

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- Determine mission and purposes, and advocate for them.
- Select the chief executive.
- Support and evaluate the chief executive.
- Ensure effective planning.
- Monitor and strengthen programs and services.
- Ensure adequate financial resources.
- Protect assets and provide financial oversight.
- Build a competent board.
- Ensure legal and ethical integrity.
- Enhance the organization's public standing.

# Traditional Staff and Board Roles

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# Operations vs. Governance: Two Distinct Duties

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“The [former] is to oversee operations in order to ensure the **current success** of the organization. The [latter] is an equal or even greater responsibility to ensure the **future success** of the organization through such things as mission, vision, strategic direction, policy, public perception, financial sustainability, and more.”

- *Mitch Dorger, Nonprofit Quarterly, 2013*

# Governance vs. Management Roles

	Governance	Management
Policy	Sets policy related to finance, strategic direction, mission and vision, etc.	Implements Board policy.
Fundraising	Approves fundraising goals; participates in fundraising activities; makes an annual personal gift.	Develops fundraising plans; sees that they are implemented.
Programs	Approves budget that provides adequate resources for programs.	Develops and implements programs and manages day-to-day activities
Planning	Creates, approves, and modifies mission. Approves strategic goals and objectives.	Participates in board planning efforts. Develops operational plans based on strategy.
Finance	Ensures that the CEO is managed and supported effectively, that the organization complies with laws, approves budget.	Provides regular financial reports to Board, manages day-to-day financial affairs.



# Setting the Scene

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What are the most difficult Board roles and responsibilities to execute?

What are some practices that our board uses to help execute our roles & responsibilities effectively?

# Think, Pair, Share

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- Think (1 minutes)
  - Jot down a few reflections about the questions
- Pair (5 minutes)
  - Pair up with one person next to you to discuss
  - Find the **one thing** you most agree on
- Share (10 minutes)
  - Get ready to share your one thing with the group!



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# High Performing Leadership Teams

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A Deeper Dive into Board Roles and  
Responsibilities

**“Two particular board characteristics matter most: the board’s understanding of its roles and responsibilities, and the board’s ability to work as a collaborative team toward shared goals.”**

- BoardSource, *Leading With Intent* 2017

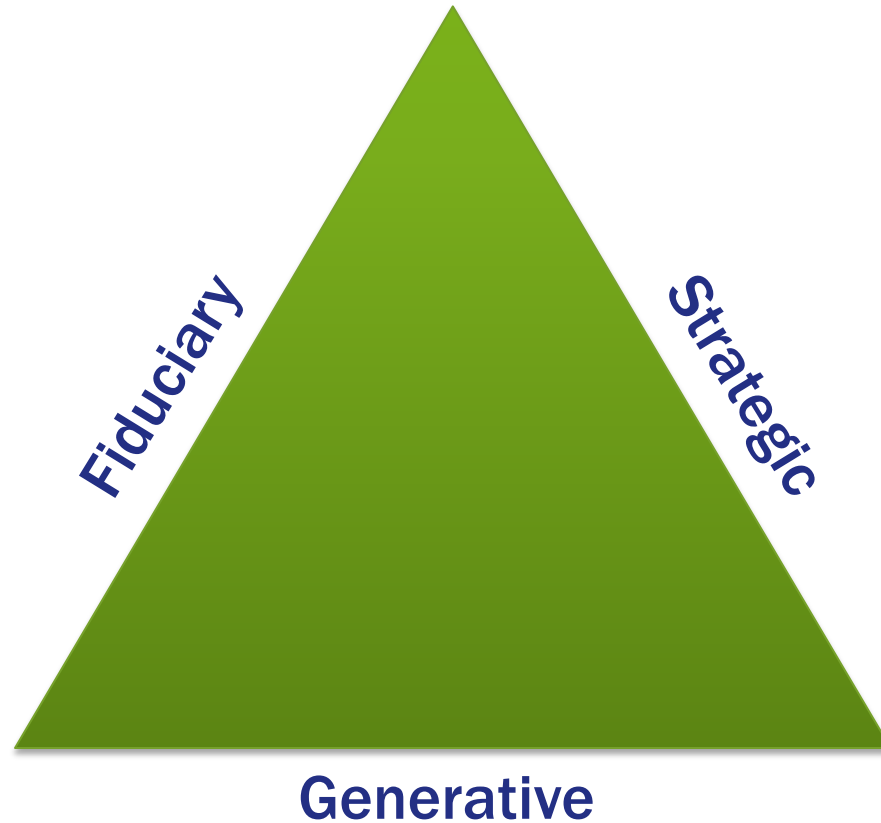
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# Board Service: New Governance Thinking

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# Board Service: New Governance Thinking

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It is our responsibility to **envision** and **shape** the future for our organizations by:

- Scanning the environment
- Bringing your understanding of context, culture and policy to the discussion
- Exploring options, ask hard questions and promote dialogue
- Re-examining goals
- Assessing and re-assessing stakeholder positions and commitments
- Reframing tough challenges
- Practicing “reflective thinking”

# High Performing Organizations: Transformational Boards

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- Are comfortable with dissention and ambiguity.
- Bring knowledge and insights that support staff.
- Think big and strategically
- Avidly avoid minutia and micromanaging.
- Understand the need to spend hard earned dollars on building organizational capacity as well as on the services.
- Establish pro-active, cutting edge policies.
- Conduct enlightened financial oversight.



# Transformational Board Members

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- Think in the future
- Connect to the community
- Not content with the status quo
- Always have a desire to get better
- Are effectively passionate

# A Few Other Findings from the Literature

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- Boards that **assess their performance** regularly perform better on core responsibilities
- **Strong understanding of programs** is linked to stronger engagement, strategy, and external leadership – including fundraising.
- Board diversity has a positive impact on **decision-making quality, responsiveness, and access to resources** (including fundraising effectiveness)

*Sources: Leading with Intent 2017, National Council of Nonprofits*

# A Bit More About Diversity

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- Diversity – having or being composed of differing elements
- Can be represented in many different ways
- Important to explore differences in a respectful environment
- Provides:
  - Different (and complete) viewpoints
  - Different connections
  - Reassurance for funders and the community
  - Increased creativity and problem solving
  - Understanding of the changing environment
  - Effective planning

# Check-Up: Areas of Focus for Many Boards

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- Committee structure
- Fundraising
- Engagement
- Meeting structure
- Board recruitment, retention, and orientation
- Performance assessment
- Planning for learning, retreats, and social time
- Communication

# Fundraising: A Fundamental Board Role

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- Cultivation
- Solicitation
- Stewardship

# What Can the Board Do?

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- Donate to the Best of Their Ability
  - Expect 100% participation
  - Expect to be a top giving priority of a Board member
- Call donors to thank them for their gift
- Drop a personal note to lapsed donors
- Identify prospects for cultivation events
- Host friend-raising events
- Identify and recruit future board members
- Speak frequently about the organization
- Accompany staff on solicitation and cultivation visits
- Identify potential corporate donors

# What Can the Board Do?

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- Practice your advocacy!

# Advocacy: A Core Responsibility of Boards

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- The board's responsibility to advocate is about fulfilling your organization's mission.
- Each individual board member should be an ambassador for the mission.
- Board members have a unique and important voice that decision-makers need to hear.

**“The voice of the unpaid, volunteer board member, acting or speaking out of altruism and passion for a worthy cause, is potentially much more influential than the highest paid lobbyist. Never underestimate the impact that a volunteer board member [can have].”**

*From Stand for Your Mission and BoardSource's Ten Basic Responsibilities of Nonprofit Board Members*



**“Greatness has more to do with how nonprofits work outside the boundaries of their organization than how they manage their own internal operations.”**

*- Stanford Social Innovation Review, “High Impact Nonprofits”*



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# The Future of CCGJ

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Planning to Plan and Next Steps

# Planning to Plan: Start Here

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Imagine it is December 2020. The Cultural Council is excelling beyond your wildest dreams. What does that moment look like, for the organization and the board?

# Planning to Plan: Rose, Bud, Thorn

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Now think about today and write down on sticky notes:

- **Rose (strength)**
- **Bud (opportunity)**
- **Thorn (challenge)**

At least 1-2 of each!

# Planning to Plan: Creating an Agenda

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- Looking at these, where is there alignment?
- What are the biggest priorities for this board over the next year?
- Any further prioritizing that you would do?

# Questions?

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*Connect • Strengthen • Advocate*

# Upcoming Events

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- **Board Roles & Responsibilities** – Wednesday, November 20, noon-1:30 p.m. (available as webinar)
- **Eleanor Ashby Beaches Series: Hiring, Firing, and Supporting Employees** – Wednesday, December 11, 9 a.m.-noon
- **Essentials Series: Understanding Your 990** – Thursday, December 12, 9-10:30 a.m. (available as webinar)
- **Board Chair & CEO Retreat** – Monday, January 27, 8:30 a.m.-4:30 p.m.

**These and many more – register at [nonprofitctr.org](http://nonprofitctr.org)**

# Thank you!

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*Connect • Strengthen • Advocate*



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# **STAND FOR YOUR MISSION**

**THE POWER OF BOARD ADVOCACY:  
A DISCUSSION GUIDE FOR BOARDS**

**[WWW.STANDFORYOURMISSION.ORG](http://WWW.STANDFORYOURMISSION.ORG)**

# WE DO THIS WORK BECAUSE WE BELIEVE IN SOMETHING.

Whether it's ending homelessness or increasing access to opera, providing at-risk youth with the opportunity to receive a strong education, or protecting global human rights. Each of us is driven by a purpose. We do what we do because we believe that some things are important enough for us to take a stand.

Each of us has made a personal commitment to serve. We do it because it calls upon the best part of ourselves. The part that believes we must try. That believes that when we do try, we can make a difference.

**DECISIONS ARE HAPPENING  
AROUND US THAT AFFECT  
OUR ABILITY TO ACHIEVE  
OUR MISSIONS.**

We exist in a world of tough challenges. A world of budget and resource limitations. A world of differing opinions and conflicting priorities.

It is a fact of life that decisions get made every day that have a profound impact on our missions. Sometimes those decisions are based on ignorance, indifference, or bias. All too often, we are not at the

table. So we are forced to pick up the pieces after flawed decisions are made. Our work suffers. Our progress gets delayed. Our missions get compromised.

Our missions deserve better.

When we are at the table, we can ensure that our priorities are heard, that our communities are represented, that good ideas are funded, and that failing policies are questioned. We can help set the stage for real and lasting success for the people and issues we serve.

The fact is, our respective missions will never be fulfilled if we are relegated to accepting the decisions that are made without us. Our missions demand that we have an impact on those decisions before they are made. And to fix the ones that get in the way of our success.

**THERE IS ANOTHER WAY.**

There are more than 1.5 million nonprofit organizations in the United States with an estimated 20 million board members at the helm. The sheer number of people who devote their lives, their money, and their time to an important mission is truly inspiring.

The most effective charitable organizations have recognized that successful advocacy does not require stepping into the quagmire of partisan politics. It simply means using our voices as committed and informed champions for our missions. Speaking the truth in a calm but unwavering voice. Reminding decision-makers of our shared values and beliefs. Sharing tested solutions to community problems. Helping community leaders understand the impact of their decisions.

But more than anything else, it requires standing for what we know to be true. It requires using our voices.

## YOU ARE THE VOICE YOUR MISSION NEEDS.

Each of us is deeply committed to our missions. Each of us has what it takes to be an advocate for our missions. As stewards of our organizations, we must find our voice.

The most useful — and under-utilized — asset our organizations have to advance our missions are the business

leaders, community volunteers, philanthropists, and opinion leaders who are so passionate about what our missions seek to achieve that they have already put their time, resources, and reputations on the line.

Our board members. Us.

Board members are the citizen leaders from whom decision-makers need to hear. Board members serve as powerful champions for our missions. We are the ambassadors who can bridge differences in opinion, turn ideas into solutions, and make good things happen.

Strong board leadership is not just about checks and balances; it is about creating the circumstances that will allow our missions to be achieved. That ensures progress can be made. That enables each of us to translate our shared beliefs into action.

Our missions will be fully realized when our community leaders hear our voices, understand our arguments, and see our causes as worthy of their best efforts. When we stand for what we believe in and insist on the best for our missions and those we serve.

# STAND FOR YOUR MISSION. YOUR MISSION. YOUR VOICE.

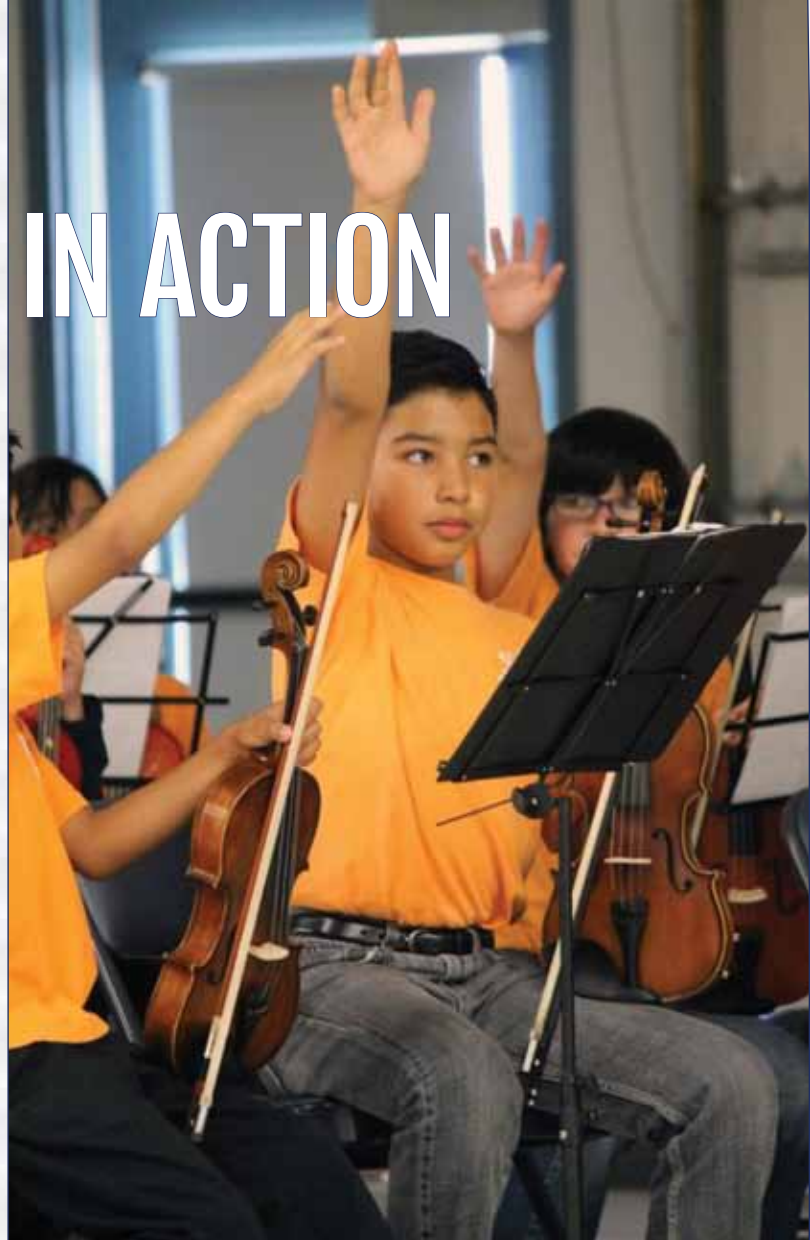


# BOARD ADVOCACY IN ACTION

## THE SAN DIEGO YOUTH SYMPHONY: A BOARD-DRIVEN STRATEGY TO GET MUSIC EDUCATION BACK INTO SCHOOLS

**THE VISION** The San Diego Youth Symphony and Conservatory's board advocacy work began with a reexamination of the organization's mission statement in late 2006 as it sought to grapple with board member disagreement. Some members believed SDYS should focus on pursuing musical excellence, while others wanted to increase access to music education. The writing of a new mission statement initiated a process of reflection and dialogue that culminated in an understanding that the two objectives were not mutually exclusive but highly complementary.

Two years later, SDYS began the League of American Orchestra's "Institutional Vision Program." This three-year training and practical application of the Jim Collins "Good to Great" framework solidified the full board's commitment to a shared vision and belief in the importance of investing equally in excellence and access. The establishment of the vision to "Make Music Education Accessible and Affordable for All" was the culmination of the process to bring the board into full unity.



**THE OPPORTUNITY** The board realized a strong connection exists between SDYS and the state of music education in schools when it examined the demographics of the students enrolled in the organization's traditional youth symphony program. The majority of those students came from affluent communities where children have access to music education in elementary school. Children who did not have access to music education in elementary school were not participating in SDYS's programs. Understanding this fact led to the board's commitment to use its resources to influence the state of music education in San Diego County. Most of the county's public schools in low-income areas had stopped investing in music education during the school day.

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The SDYS board now speaks of its success in terms of the systemic change it is achieving with school districts in addition to the individual change it is achieving with the student musicians in its programs.

Dalouge Smith, president and CEO, San Diego Youth Symphony

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**THE STRATEGY** Once the board had settled on its vision, a strategy for achieving the vision became necessary. The board understood immediately that it was unrealistic for SDYS to build the capacity and infrastructure to provide music education to the hundreds of thousands of students in San Diego County not receiving it. Creating such an infrastructure could only be achieved if it duplicated the existing public school system capacity to deliver educational experiences to every child. Instead, the board decided the quickest path to fulfilling its vision was to convince the county's public school systems to provide in-school music and partner with them to make it happen.

The board started from the belief that school districts have the resources and capacity to deliver music education but don't make music a priority. SDYS set out to influence school districts to invest in music education by launching the Community Opus Project. The Opus Project piloted a free after-school instrumental music instruction program for third-graders in the Chula Vista Elementary School District so that both school administrators and parents could witness the value learning music delivers to children. In this way, the board saw advocacy as the overall purpose of SDYS's Community Opus Project.

Advocacy is now written into SDYS's strategic framework as one of five principal activities. In the framework, it is defined as "community action" because in addition to exerting advocacy influence itself, the board aims for SDYS to galvanize community stakeholders, other partners, and parents to serve as advocates for in-school music education. The community action work includes a robust

community relations campaign involving numerous performances by Opus students throughout the community to build awareness of the benefits of music education and rally supporters. Opus students have performed before the city council, school board, parent committees, and local service organizations. Opus parents, who were encouraged to engage in the Opus lessons and attend school board meetings, have become powerful advocates for in-school music. The SDYS board now speaks of its success in terms of the systemic change it is achieving with school districts in addition to the individual change it is achieving with the student musicians in its programs.

**THE RESULT** Within the first year of SDYS's Community Opus Project providing music instruction at no cost to third-graders in two schools within the Chula Vista School District, the positive effects of learning music were so apparent that the district asked SDYS to expand the program to serve more students and provided funding to help make the expansion possible. In the second year, the district asked for an expansion to in-school music, and, in the third year, it committed to returning the music education program that had been eliminated 15 years earlier to all schools. The district has already hired full-time music teachers for eight of its 45 campuses and plans to hire more each year until in-school music is available for all of its 29,000 students. SDYS continues to provide after-school instruction and support the restoration of in-school music for the district. SDYS now also works with several other school districts in the region to support and guide their efforts to return music to their schools.



# STARTING A CONVERSATION IN YOUR BOARDROOM.

Every nonprofit has its own unique history, culture, and mission, and, therefore, its own view regarding advocacy. But, no matter where you are on the continuum — doing no advocacy to doing a lot — the path toward greater impact through advocacy begins with an honest conversation in the boardroom — a conversation about your organization’s mission, goals, and, most importantly, its vision for the future.

The following guide is designed to help you start that conversation. While some organizations may be able to move ahead quickly because they have already grappled with the more fundamental questions presented here, others may want to spend more time on those questions before moving on. Regardless of where your organization starts, we encourage you to use this guide as a tool for facilitating ongoing board dialogue on your organization’s legal right to advocate and for helping you cultivate a culture of standing for your mission in all possible ways.

## STEP 1: A SHARED VISION FOR THE FUTURE

Your organization was founded to meet a specific need or purpose and, as a part of that, is likely to have a vision of what the world would look like if that mission was achieved. Ask your board to answer the following questions:

- Is the board in agreement about our organization’s vision for the future?
- How would the world be different if our mission was fully achieved?
- Are our current strategies the fastest or most direct path to achieving our vision? If not, what would be?

## STEP 2: A DEEPER UNDERSTANDING OF YOUR WORK

All organizations are impacted by the larger environment and ecosystem in which they operate. Understanding what that ecosystem looks like for your organization, and where you are situated within it, is a critical step for your board. Ask your board the following questions:

- What are the societal realities or problems that our work seeks to solve, alleviate, or otherwise address?
- What are the broader issues associated with our core work?
- Are our strategies actively addressing those issues? If not, what would change if they did?

## STEP 3: IDENTIFICATION OF THE OPPORTUNITIES AND THREATS

Changes in your community, funding sources, and policy environment affect — either positively or negatively — your organization's ability to achieve its mission. Identifying and understanding the opportunities and threats affecting your organization is a key step in building an advocacy strategy and in ensuring that your board is well-positioned to help implement that strategy. Ask your board the following questions:

- What are some of the external factors that have positively or negatively impacted our work in the past? How well did we — as a board — anticipate them before they happened? Did we try to stop or soften the bad ones, or rally to support the good ones?
- Are there policy changes that would dramatically improve (or threaten) our ability to fulfill our mission and vision? If we could advance our mission more effectively by changing one law, public policy, or public attitude, what would that change be?
- Do we have candid conversations about the reliability of funding that we earn through government contracts or grants?
- Are we — as an organization — actively engaged in conversations with decision-makers about the policies or decisions that affect our work? If not, why not?

## STEP 4: BOARD ENGAGEMENT IN MAKING IT HAPPEN

Every board member brings a potent combination of passion and influence to his or her board service that — if leveraged — can powerfully accelerate your organization's advocacy strategy. Understanding your board's networks and spheres of influence can help you map the ways each board member can help. Ask your board the following questions:

- Do we regularly discuss the implications of public policies and funding to our mission?
- Do we have a public policy strategy for our organization, and — if so — is the board well-informed about how best to support it?
- Do we have board leaders who can speak to and connect with a broad cross-section of community needs and constituencies in support of our work?
- Have we provided training or guidance to board members about how to engage effectively in advocacy efforts that enables them to represent our mission and work with confidence?

## STEP 5: MAKING ADVOCACY A PART OF YOUR BOARD'S CULTURE

A true cultural change happens when advocacy becomes fully integrated into the way that your board thinks, makes decisions, and measures its own success. Ask your board the following questions:

- Do we have goals for our advocacy work that enable us to assess how well we are doing across all the links and connections that are vital to our success?
- Is a degree of advocacy a part of every board member's job description?
- Is our board recruitment strategy aligned with our public policy strategy, and the connections or influence that will ensure our success?
- Are we — as an organization — actively participating in coalitions and organizations that are helping to advance our advocacy strategy?



# ACTIONS FOR NONPROFIT LEADERS



IF YOU'RE A  
NONPROFIT CEO...

- 1. Just starting out:** Engage your board in a conversation about what public policy is and how decisions made by people outside your organization influence your mission, making it easier or harder to accomplish.
- 2. Building:** Educate your board members about key policy issues that positively or negatively influence your organization's work (or could), and tap them to help open doors and make the case to external decision-makers and opinion leaders.
- 3. Accelerating:** Identify gaps in your organization's advocacy network and engage the board in recruiting new board members to help bridge them.
- 4. Connecting:** Join groups that monitor policy matters that might support or threaten your nonprofit's mission. Stay up to date on state and federal policy issues affecting nonprofits and your mission on the [National Council of Nonprofits's website](#), and then engage when appropriate.



IF YOU'RE A NONPROFIT  
BOARD MEMBER...

- 1. Just starting out:** Talk with your board chair or CEO about how your board can get more engaged in advocating for your organization's mission.
- 2. Building:** Participate in a training session about how to become a stronger advocate for your work.
- 3. Accelerating:** Institutionalize your board's role in advocating for your mission by incorporating it into your board job description and expectations.
- 4. Connecting:** Join groups that monitor policy matters that might support or threaten your nonprofit's mission. Stay up to date on state and federal policy issues affecting nonprofits and your mission on the [National Council of Nonprofits's website](#), and then engage when appropriate.



## IF YOU'RE A FUNDER...

- 1. Just starting out:** Engage in an internal conversation about what public policy is and how decisions by policymakers and others make it easier or harder for your grantees to accomplish their missions. Many foundations are inadvertently discouraging nonprofits from engaging in vital advocacy efforts by using unnecessarily hyper-restrictive or ominous language in grant agreements. Review your proposal guidelines and grant agreements to make sure you aren't artificially restricting your grantees' constitutional rights to speak up to advance their missions. For guidance, check out [this resource](#) from the Alliance for Justice.
- 2. Building:** Consider providing more general operating support grants that provide the flexibility to rally resources quickly to engage in advocacy campaigns as needed.
- 3. Accelerating:** Engage grantees in conversations about how they are using advocacy as a tool for greater impact. The Alliance for Justice has [suggestions on how to begin that conversation with your grantees.](#)
- 4. Connecting:** Stay up to date on policy issues affecting [foundations](#) and [nonprofits](#) and engage when appropriate. The Forum of Regional Association of Grantmakers created [this list of questions to think through prior to reaching out to a policymaker.](#)

# ABOUT THE STAND FOR YOUR MISSION CAMPAIGN

The **STAND FOR YOUR MISSION** campaign calls on all nonprofit decision-makers to stand for the organizations they believe in by actively representing their missions and values, and creating public will for important policy changes. A collaborative effort initiated by the Alliance for Justice, BoardSource, the Campion Foundation, the Forum of Regional Associations of Grantmakers, the Knight Foundation, and the National Council of Nonprofits, the campaign seeks to unleash the full potential of nonprofits to advance their missions by engaging board leaders more directly in the advocacy work of their organizations.





# GET ENGAGED

The most important action you can take is to start a conversation in your boardroom about how advocacy can accelerate the impact of your mission, with this resource as your guide. If you are also inspired to engage with our national campaign, we encourage you to join us.

Here are some ways to connect with the **STAND FOR YOUR MISSION** campaign:



**SHARE** your story about how board engagement in advocacy strengthened your organization's impact by submitting a "success story."



**CONTRIBUTE** a "photo pledge" to share what you stand for on [www.standforyourmission.org](http://www.standforyourmission.org).



Join the conversation about why board engagement in advocacy matters by joining the **STAND FOR YOUR MISSION** **LinkedIn** group.

Access more resources and tools to support your board's engagement in advocacy at:

**[WWW.STANDFORYOURMISSION.ORG](http://WWW.STANDFORYOURMISSION.ORG)**





*Your Mission. Your Voice.*

**[WWW.STANDFORYOURMISSION.ORG](http://WWW.STANDFORYOURMISSION.ORG)**