PUTTING BELONGING TO WORK ON OUR BOARDS

Is your board working at its highest potential to fulfill your organization's mission? Are diverse voices included and valued in its processes? Are your meetings generative and interactive, with each board member contributing, or do they consist mostly of frontal presentations and approvals? Does your board solve problems together effectively? Do members disagree constructively and respectfully? How well do board members know and trust each other?

Most boards would land somewhere along a continuum for any of these measures of excellence, but two things can be said for all boards:

1. There is always room for improvement—and in many cases, quite a lot!
2. None of these elements of board culture will shift without intention, design, and sustained effort.

The Culture of Belonging framework offers a set of principles and a toolkit for building stronger, more effective boards by bringing the best of each board member in advancing the organization's mission together. Furthermore, boards play a critical culture-setting role, and the changes they start can cascade across their organizations.

JCF JEWISH COMMUNITY FEDERATION & ENDOWMENT FUND

in partnership with

VARDA Institute for Community Building

Why Invest Time Designing for Belonging Culture on Boards?

A Boardable report[1] which studies board engagement found that:

- Only 10.9% of board members say their boards encourage every member to speak during a meeting.

- 60% say they have no interaction or communication between members outside of the meeting.

Boards that Prioritize Belonging

In May 2021, as part of the Federation's 473K Culture of Belonging Conference, we gathered a group of leaders from high-performing Jewish boards to share their wisdom on building inclusive and cohesive board cultures. What happens when a board prioritizes and designs for belonging? Here's what they reported:[2]

- Transformative conversations among board trustees on meaningful topics that they wouldn't discuss otherwise, ultimately deepening their relationship to the organization and each other.

- A diverse pipeline of leaders increasing the breadth of perspectives and skills, along with policies and practices that prioritize equity.

- Open dialogue and dissent within board discussions so that all voices are valued, and the organization can question assumptions, hear new ideas, and stretch beyond old patterns of thinking.

- A culture and environment that brings each member's best skills and talents in service of the board's mission with the result that members are participating more actively and passionately as ambassadors, donors, and leaders.

- Each member feels connected to the mission of the board and to each other. They each have meaningful roles to play and, as a result, they feel seen, valued, and motivated to work together and over come difficulties to advance the board's shared goals.

- A board that accomplishes more as a group makes a deeper impact and better decisions, and spreads Culture of Belonging approaches to the rest of the organization.

Board Diversity and Belonging

Many North American Jewish organizations are belatedly coming to terms with the lack of racial, ethnic, gender, cultural, socio-economic, and other types of diversity within their leadership and communities, and are seeking to build boards that reflect our richly diverse population. The most successful of these are not only recruiting new board members but adapting board culture to ensure belonging for all members while addressing the biases and structural inequities that have marginalized so many in mainstream Jewish institutions.

Through Diversity, Equity & Inclusion (DEI) work, we can build awareness of patterns of oppression, privilege, gender discrimination, bias, and white supremacy. We can learn skills like empathy, resilience, and accountability for mistakes, and change organizational policies and practices. The Culture of Belonging framework adds a critical next step, creating a sustainable environment for all board members to show up as their full selves with equal voices to forge a common mission together.

[1] *"Third Annual Nonprofit Board Engagement Survey Report, Boardable, 2020"*
[2] *473K 2021 - Putting Belonging Back on Our Boards Design Studio*

How Might a Board Adopt a Belonging Mindset?

Changing your board belonging culture has the potential of affecting your entire organization and community and takes a planning and implementation process.

This tool can get you started.

Build Shared Purpose

Connecting board members to the purpose of the board and organization goes deeper than simply reminding them of the mission statement or approving strategic goals. It's really about helping board members link their own values, passions, and purpose, with each other's and with the organization's mission, to feel a sense of ownership and partnership - "This is mine and we are in this together!" It doesn't just happen - it's an active, intentional process.

- Facilitate opportunities to connect individual values with the board's mission as an opportunity to clarify roles and build cohesive purpose. Board policy or planning discussions can begin with a prompt, inviting members to share their own values related to the topic, for example.

- Setting group norms through an inclusive process will also elevate shared values, allowing each member to see themselves and their beliefs in the shared rules of conduct.

- Build board unity and cohesiveness, not around members' common traits, but by defining shared values and unified purpose, and by developing relationships and trust over time. For example, by providing opportunities for board members to work with each other in small groups.

- When we over-emphasize common traits, we risk excluding people who are different. Boards should cultivate and celebrate differences among members - diverse identities and different opinions and backgrounds. Focusing on commonalities (like playing "Jewish geography" or assuming everyone has similar Jewish backgrounds) can reinforce outsider status of those who feel different.

Set Belonging Goals

Think of your desired outcomes related to belonging and ask: What do we want participants to feel, know or do as part of this board? What outcomes do we hope to see as a result of greater belonging, commitment, collaboration, and cohesion?

- Set concrete, measurable belonging goals for how members participate (for example, everyone participates in discussions and decisions, or disagreement is openly aired), how they interact together and deepen connections, collaborate, volunteer, lead, give, and bring their networks.

- Be prepared to measure belonging goals. You can survey board members (ask: do they feel seen and valued, can they bring their full selves, are they building trusted relationships with peers?); observe behavior and track outcomes like progress on goals, recruitment, and engagement.

- Include belonging goals that address diversity and equity. For example, board members of all identities feel like equal partners on the board, and board members are trained in DEI skills and awareness.

Once you identify specific, measurable "Belonging Goals" for how board members will feel and participate, and how the board should function as a group, it's easier to design tactics (and metrics for success) that will bring those goals to life, using the Ten Culture of Belonging Principles as a roadmap.

Design Participatory Meetings

Since meetings are the primary way boards conduct business, it's imperative that board meetings are designed to maximize belonging, inclusivity, commitment, and participation.

- Incorporate rituals with care to make them inclusive, keeping in mind all the diverse identities on your board.
- Intentionally plan opportunities for personal sharing.
- Enable small group work.
- Invite members to help design or play roles at meetings.
- Set up the room to support interaction.
- Curate video meetings that keep people actively engaged with different modalities.

These tactics are not an "add-on" to the "real work" of the board; they should be integrated into how the board conducts its work. As a result, members will be motivated to bring their full selves, with all their gifts and talents, to work together towards the board's shared mission. See our Transformative Meetings tool for more ideas and Liberating Structures for formats that foster inclu-sive group facilitation.

Tap Members' Best Assets

When we limit board roles to the same few tasks we "need" (like giving at a certain level, voting on actions, or promoting the organization as ambassadors), we miss out on the full range of talents and perspectives board members could be contributing, and they may feel invisible and unappreciated for their unique gifts. An "unseen" board member is less likely to contribute their thoughts, time, or money to the cause.

- Map members' assets. Asset mapping reveals the strengths and resources on your board, not only helping members to know each other more fully, but also to mobilize these strengths in support of your shared mission and community. There are many ways to do this - we offer a mapping tool you can adapt for your board.
- Invite board members to bring their unique talents to the board and organization. You might be surprised how creatively a poet, a challah baker, a financial advisor, or a people-networker can contribute their skills, and how doing so not only makes them feel seen but shifts them from passive members to active partners of the group.

"Come for the 'What,' Stay for the 'Who'" [3] - Strengthen Relationships, Empathy, and Trust

Many boards make the mistake of focusing entirely on business (the "what") and fail to systematically build the relationships (the "who") among board members that lead to a more cohesive, collaborative, and ultimately effective board culture. Relationships on most boards evolve randomly and without intention and are therefore inconsistent across the board. While there is no intention that board members will become best friends, the unique relationships that can be formed on the board promote not only the board's mission but a sense of pride and cohesiveness among its members.

[3] Dr. Sara Shadmi-Wortman, Co-Founder and CEO Varda Institute for Community Building

Each board meeting can include structured opportunities for members to share something about themselves, tailored to the purpose, timeframe, and attendees (how well they already know each other, the different backgrounds and identities of the members). Deeper relationships and trust also come from the space between meetings—the experiences you share and the way you can count on each other for support when needed. See appendix for several prompts that are particularly suited to boards.

- Incorporate multi-dimensional sharing (opportunities to get to know other aspects of each other, aside from your role as board members) to deepen relationships among board members. This guide to Opening and Closing Rituals can help you design the right relationship-building moments for your group.

- Design personal sharing activities with care and intention, adjusting to the size and diversity of the group, the group's familiarity and acquaintance, and the setting and purpose of the gathering. Prompts should feel accessible, inclusive, and safe to all, related to the purpose of the meeting, and deep enough to bring out authentic glimpses of each other.

- Build experiences outside the boardroom (or Zoom screen) that bring members into shared moments of meaning together, whether an offsite retreat, home-hosted dinner, family picnic, trip to Israel, or even virtual gatherings that take people out of their usual setting.

- Create practices for caring and supporting each other (for example, calling members who miss a meeting to fill them in, or showing up for losses and milestones) to foster an atmosphere of trust and safety.

Connect People Through Small Groups

Small groups are key to connecting people to each other and to something bigger —whether a board, its mission, or the larger organization. This is especially important for onboarding new board members and bridging differences among generations, wealth, race, ethnicity, and other identities. People build relationships more readily in small groups, speak up and participate more actively, and connect to the larger board or organization with greater confidence.

Small groups are the most effective structure for getting things done and achieving change (which is why most board work happens in committees!)

- Within meetings, use small group structures (breakouts), as a way to encourage deeper individual and collective participation.

- Draw on Culture of Belonging principles to design more bonded and effective board committees.

- Facilitate formation of interest/identity-based affinity groups so that members can feel anchored and supported by peers, and show up in the larger board with confidence in their full identities.

- Affinity groups can also lead change on the board (for example, around anti-racism).

- Assign each board member to a peer-led small group as an anchor within the larger board.

When Arthur Slepian began his tenure as board chair of the San Francisco based Jewish Community Federation and Endowment Fund at the beginning of the COVID-19 pandemic, one of his first moves was to assign each board member to a peer-led small group, which met by Zoom in between board meetings. Arthur recruited group leaders who were natural people-connectors and also familiar with Culture of Belonging principles. The groups (which are re-assigned each year) provide a platform for board members to know each other more deeply and to process complex issues on the formal board agenda.

The results (measured through board surveys and board participation) have exceeded expectations: board members report stronger relationships, trust, and connection to each other; empathy and understanding across differences; feeling that they matter and are seen and valued on the board. Newcomers and those who might have felt marginalized speak up more readily and openly, and all board members demonstrate increased initiative and collaboration. As the Federation board recruited more people of color and embarked on a major equity and racial justice initiative, the board small groups were a critical tool for building a board culture where all members could feel they belong with their full identities, and could contribute their best selves.

Conclusion:

The outcomes of a Culture of Belonging on the board start with individual members and cascade across the organization. When board members feel seen, heard, and valued for their full identities, they are energized and motivated to give their best to each other and to the organization's mission. The relationships, trust, and sense of shared purpose they develop together result in a more cohesive, effective board. By modeling belonging mindsets and approaches, the board sets values and priorities that can ripple among the professional team and the broader community, multiplying the impact.

Appendix:

Sample Prompts for Board Sharing:

1. Share a time when you made a deep impact as a leader or board member - what made it so?

2. Share a time when you collaborated with others that was meaningful to you.

3. How have you personally felt you made a difference with a cause or organization?

4. Share something you've learned about yourself or a strength you've discovered in the last year.

5. Share a talent or personal quality you bring (or want to bring) to your board work.

6. Share one thing you want/need from your fellow board members to help you participate as your best self

7. Share a seed (idea, connection) you've planted that has blossomed and made you proud.

Belonging Indicators

The following are indicators of belonging on a board that can be used or adapted to assess the health of your board at points along the culture change process.

On a scale of 1-3 (Yes, No, Somewhat):

1. Do board members know each other in multi-dimensional ways (beyond board roles)?

2. Does everyone participate actively in meetings?

3. Does everyone contribute or engage with others between meetings?

4. Do members feel comfortable disagreeing and sharing dissenting opinions?

5. Do you solve problems together well?

6. Do you know what skills, talents, and networks each member brings, and are we tapping into them? Does the board see and tap your best skills, talents, and abilities?

7. Do you celebrate personal achievements / take notice of bereavements? Do you take care of each other when needed?

8. Do you have rituals in place to celebrate board achievements and milestones?

9. Do you share additional aspects of life together with other board members?

10. Does the board reflect the organization/community it serves?

11. Do board members feel visible and embraced for all their identities and comfortable sharing their full selves?