

Create principles that drive engagement in governance

What you'll accomplish:

Create principles that drive how you engage those impacted by your mission in your governance work. This will help your board and staff leadership to:

- Build more effective engagement strategies.
- Ensure engagement is aligned with organizational values, such as equity.
- Make engagement intentional, not based on unspoken assumptions, old norms and individual personalities.

How it works

This exercise can be done with the whole board and staff leadership or a smaller working group consisting of both, which is then approved by the board.

- 1** Develop the engagement principles.
- 2** Determine how to activate them in your engagement strategies.



Go to the Conversation Guide for detailed instructions.

Conversation guide



Overview

Creating principles will strengthen the engagement of those who are impacted by the organization's mission and other interested parties, whether it's for consultation or deeper, shared decision-making. The principles inform everything from how you listen and communicate to the quality of your relationships.

There are many occasions to engage others in governance work, such as:

- Developing a board policy
- Creating a strategic plan
- Revising a significant program or service
- Taking advantage of an opportunity or addressing an issue.

Example: Governance principles

Example

Driving engagement practices, processes and relationships

We will:

- Whenever possible, seek the views of those impacted by significant governance decisions because a diversity of experience, skills and knowledge enhances them. It also enables greater accountability to those within our ecosystem.
- Ensure people's input clearly influences our decisions and actions. To do this, we'll avoid token representation, clarify expectations and accountabilities, acknowledge relationship dynamics, and seek genuine dialogue.
- Make engagement accessible, knowing that people have a variety of needs and preferences. Information will be clear, honest and comprehensive so that everyone can make informed contributions.
- Listen openly and carefully, acknowledging we all have biases that influence how we hear things.
- Be purposeful in our planning, knowing that authentic engagement takes time and resources.
- Continuously review the engagement principles and ensure we're held accountable for living them.



NOTE: These are meant to stimulate conversation and ideas, not to be copied.

Pework

These resources are helpful:






- [Governance as Shared Leadership \(video\)](#)
- [Shared Decision-making for Nonprofit Governance](#)
- [Impacts on Governance Design for Nonprofit Organizations](#)
- [Governance Functions and Responsibilities in a Nonprofit Organization](#)

Steps




Step 1 Identify the engagement principles

TIPS

-  Involve a diverse group of people, so outcomes are authentic.
-  Ensure the principles are both inspirational and measurable. Use plain language and describe the highest-level value as well what it can look like.
-  Be patient because the process can be messy. Ensure there's buy-in to the final principles so that people can be held accountable.

CONSIDERATIONS

Conversation prompts:

-  Do we have a shared understanding about what is meant by the word engagement, for example is it everything from consultation to shared decision-making; and what are its benefits?
-  How do our organizational values translate into governance engagement principles?
-  What will make our engagement practices genuine and effective?

Step 2

Activate your governance engagement principles

TIPS

- ✓ Ensure the governance engagement principles are captured in a document that can be shared.
- ✓ Set reasonable expectations for change. It takes time to shift if there's misalignment between current engagement and the principles.

CONSIDERATIONS

Conversation prompts:

- ✓ Are there barriers to implementing the engagement principles and if so, how can we address them, such as:
 - Misalignment with our current governance culture
 - Entrenched ways of doing our governance work?
- ✓ How will we keep the principles visible, such as:
 - Incorporating them into board and staff leadership orientations
 - assessing engagement strategies against the principles?
- ✓ How will we hold ourselves accountable for delivering on the principles,
 - sharing them broadly with those we engage
 - building them into policy documents?
- ✓ When will we review the principles and if necessary, revise them?
- ✓ What happens next, who will do it and by when?

This tool is part of the Reimagining Governance Lab, a virtual hub for governance innovation full of resources, tools, and stories. [Visit the Lab.](#)

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