Looking Forward by Giving Back: *How* and *Why* Project Managers Should Consider Serving on Not-for-Profit Boards

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Abstract

This article discusses how project managers can leverage their experiences and skills to give back to their communities by joining the board of directors of not-for-profit organizations. The article begins by presenting the skills that render project managers uniquely positioned to positively impact not-for-profit boards and provides specific examples to illustrate this concept. Hands-on tips are also provided to give project managers specific ideas on how to make an immediate impact. The article then provides an analysis of how individual project managers will benefit both personally and professionally from serving not-for-profits in this capacity. The article concludes by commenting on how not-for-profit board service can be viewed in the wider context of the progression of the project management discipline.

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Across the Board

The board of directors occupies a special place in the world of management. This body, used in various forms by most for-profit and not-for-profit organizations, often represents the pinnacle of leadership. On a general level, a not-for-profit board (Note: For the remainder of this article, "board" will refer solely to a not-for-profit board) is understood by most to be the body that governs the operations of the organization. These responsibilities typically include the following activities:

- Developing and reviewing the mission, vision, values, and other strategy documents

- Ensuring financial accountability for the organization and meeting individual duties of care
- Developing, approving, or implementing policies and procedures
- Conducting performance reviews of the executive director
- Fundraising and donor development

In addition to these important roles, board members also act as representatives of the organization. Here, board members are required to understand and promote not only the operations of their organization, but the *vision* that drives the organization to provide their services.

How Project Managers Can be Effective Not-for-Profit Board Members

At first glance, some observers may conclude that project managers are not uniquely qualified to meet the above requirements; however, there is much evidence to the contrary. This section focuses on identifying specific project manager skills that can be very valuable to not-for-profit organizations. Understanding this impact will not only help advance the project management field, but will also enable project managers to perceive their *current* roles in a more strategic light. A discussion of the following skills will help demonstrate this in detail:

Strategic Implementation

Interestingly, from a high level there is a solid link between boards and project management. For instance, consider the example of a not-for-profit company that is attempting to open a new location to provide additional art therapy lessons. The need to expand is likely based upon a specific strategy identified or approved by the board. The method often used to implement such a directive would be to designate a leader and begin creating tasks to identify locations, realtors, regulations, and other relevant factors in acquiring this new location. Although it may not be identified as a project by name, this approach is really a terrific example of *project management.*

We can now see how projects, and thus project management, should be strategic in nature. *A Guide to the Project Management Body of Knowledge (PMBOK® Guide)*—Fourth Edition also emphasizes that projects have the potential to impact strategic plans (Project Management Institute, 2008, p. 10). Given that this is part of our methodology, it's common for project managers to be skilled at being aware of the business justification for their projects, even if they weren't brought in until after the project initiation phase. This awareness helps drive the operations of the project. Project managers are also skilled at understanding how their project outcomes, in turn, impact the overall strategy of their company.

Similarly, many project managers have direct experience leading projects specifically requested by executives. They are likely to have significant experience supporting and communicating with high-level executives about strategy execution and this is great preparation for understanding the dynamics of boards. Furthermore, this type of executive exposure may not be as common among professionals from other disciplines who may be considering board service.

Organizational Awareness

Many project managers have experience working on several different project teams, for different companies and, in many cases, across industries. It's well documented that different companies and industries have their own customs for conducting business. *A Guide to the Project Management Body of Knowledge (PMBOK® Guide)*—Fourth Edition also highlights that organizational culture is an important enterprise environmental factor that project managers frequently experience (Project Management Institute, 2008, p. 27). This demonstrates that project managers have experience *perceiving* these customs and often change their behavior and tactics to meet the needs of their current project, client, or stakeholder.

Although almost second nature for most project managers, this is a highly valuable board skill. Boards often consist of a range of successful members from diverse fields, such as law, management, and engineering. Project managers are well equipped, through their advanced organizational skills, to understand the complications this leads to. Boards, like any group or team, come with their own sets of procedures and customs, and with so many different points of view being represented, it can often be hard to achieve unanimous decisions. However, project managers can rely on their extensive service delivery skills across multiple environments to help ensure progress is not only achieved, but achieved in the most efficient and beneficial manner.

Hands-on Tip: Get to know your fellow board members and ask questions. Specifically, inquire about their opinions and not just *what* they want to do, but *why they want to do it.* Board members often have long histories with their cause or the organization, and it will be very helpful to understand these dynamics when working as a group.

Process and Planning

Another skill project managers have is their understanding of process, process improvement, and planning. This skill is important for two main reasons. First, most boards share one thing in common—they are short on time. By definition, board members are volunteers and are likely to have full-time positions of their own, potentially in positions with heavy time demands. Second, board members are often asked to operate outside their comfort zones and perform tasks they are not accustomed to due to the cross-functional nature of board work. For example, many professionals have limited experience with fundraising in their daily jobs.

These two factors combine to create strong needs on many boards for effective time management, detailed planning, and the understanding of how inter-related processes come together. This is another area in which project managers can rise to the occasion and readily rely on their work experience to lead the way. There are many ways in

which project managers can help, but the following will be useful in promoting effective planning:

Hands-on Tip: Create a simple project plan to track the board's internal work, either on a large initiative or across the spectrum of board activities. This may be one of the most pressing needs and will help all board members visualize their activities, which may lead to capacity discussions based on a more complete understanding or the identification of deficient areas.

Hands-on Tip: Assist with board fundraising by creating personalized fundraising road maps for each member. Fundraising is an area in which many board members have limited exposure, and effective planning can help identify simple tasks and make a complex area seem more manageable. (Please see Appendix A for a sample of an individualized fundraising road map.)

Hands-on Tip: Create and own a simple "resource plan" for board members. Here, it may be helpful to identify when members will be unavailable due to work or travel, to plan board teaming events or other board activities, and mandatory board activities for the upcoming year.

These examples are just some of the many ways in which project managers can take the process and planning skills they use every day and implement them to benefit the board. This process will not only serve as an operational benefit but is likely to increase overall board efficiency and the likelihood of success for specific initiatives.

Meetings and Committees

It is common knowledge that boards rely heavily on meetings to conduct business. Fortunately, project managers come well equipped to ensure meetings are a force for progress, rather than an obstacle. Almost all project managers frequently prepare for and *facilitate* meetings with important stakeholders. Here, project managers can rely on their significant meeting experience to help ensure the following:

- Appropriate meeting preparation is conducted
- Clear objectives are set and communicated beforehand via a concise agenda
- The appropriate attendees are invited
- The required documentation is available before and during the meeting
- Progress is made toward the objectives
- Action items are identified and assigned

Although second nature to most project managers, this level of detail and organization can be lacking in board members. By decreasing the inefficient use of time, project managers can help keep the focus on performing the tasks needed by the organization.

Hands-on Tip: Project managers should also not overlook the value of agenda and presentation templates. Creating and sharing these tools with other board members will help promote the value of organization and preparation and also save time!

Committee work is another area in which most project managers are comfortable taking the lead. Project managers can draw a parallel between board committees and the separate work plans and work teams they have managed as a part of their jobs and employ their program management skills to help the board achieve cross-functional results. This analogy will help ensure project managers tap into their many skills, including managing the project team, risk management, and communications management.

Hands-on Tip: Identify and track touch points and action items *across the current* committees to ensure there is no duplication of effort and that the appropriate stakeholders are involved.

Lessons Learned and Internal Assessments

Another important area that project managers can immediately take the lead on, is employing project monitoring and assessment skills. Here, project managers can promote the value of conducting lessons learned analyses, which is an important recurring activity for project managers (*A Guide to the Project Management Body of Knowledge [PMBOK® Guide]*—Fourth Edition, Project Management Institute, 2008, p. 64). As noted above, the board proposes or leads many initiatives, or "projects," and often supports several simultaneously. But, in the drive to achieve results, reflection and assessment are often overlooked, which can be a costly knowledge loss that could have been used to optimize future results. Project managers can provide operational insights by ensuring this important action is conducted *completely and accurately.*

And what about a lessons learned analysis for individual board members? It is common for board members to be overworked, which can lead to a failure to conduct assessments, knowledge transfers, or individual member assessments. Project managers are uniquely positioned to take the lead on this front and provide the templates, structure, or organization needed to ensure these important tasks are completed.

Hands-on Tip: Review existing board policies and procedures, and if there is no policy or document for individual board member assessments, create a draft assessment document and propose your idea to the board.

Seek buy-in, adopt the feedback, and send the completed version for review and approval by the board.

Project managers can lay the foundation for organized and efficient decision making by assisting the board in managing its own knowledge and resources

Why Project Managers Should Consider Serving on Not-for-Profit Boards

Now that we've seen how project managers can use their skills to make a positive impact on aboard, the question for many project managers may be: *Why* should I serve on a board? There are many reasons why this challenging public service opportunity is worth considering; some are obvious, whereas others, no less important, take a little extra effort to identify. Although there are many reasons why board service is a wonderful opportunity, considering the reasons below will provide project managers with the critical input for making this important personal and professional decision.

Giving Back to the Community

All community service, and certainly serving on a board, should be performed for the benefits of the cause and the recipients of the not-for-profit's services. Although there are benefits to the volunteering board member (listed below), the primary focus *must always* be on those being served. Thus, the answer to the question, "Why should a project manager volunteer on a board?" is because he or she has found a cause that he or she is *passionate* about and wants to help ensure that the best and most efficient services are provided *to this cause.* If you find your passion, the answer to the "why"' question will fall into place.

Many of us have participated in 5K races, donation drives, fundraisers, and raffles to support our own volunteer efforts or those of our families. This is not-for-profit work in motion, because the majority of these events are fundraising initiatives conducted by not-for-profits, and many of these events were likely discussed at some point by a board. Step back and think about the cause you find yourself giving time to, and you're likely to have found the cause you're best positioned to support from a board perspective; chances are the answer is already in front of you. Combining your passion to help with your project management skills will uniquely position you to support "your" cause.

Here we see even more congruence between board service and the field of project management, because *A Guide to the Project Management Body of Knowledge (PMBOK® Guide)*—Fourth Edition, clearly states that all projects have external stakeholders, and one of these stakeholders is always the community at large (Project Management Institute, 2008,

p. 24). From this perspective, board service can be seen as a project that has a large, but well-defined stakeholder that must always be supported through your actions. Just as you may report to the Chief Information Officer or program management office director at work, when serving a not-for-profit you "work for" the people you serve. Approaching board service in this manner will help ensure the same accountability, methodologies, and planning strategies you use at work will guide the commitment to your cause.

Gaining New Perspectives

When making the decision to put *others* first and *give* time and knowledge to a cause, it's also important to note that project managers in so doing will undergo many beneficial professional experiences. For example, there is no better way to develop enhanced strategic skills than by gaining the ongoing, hands-on experience of board service. And, more importantly to project managers, board service *requires* top-down, strategic thinking. As noted above, project managers have experience *meeting* strategic objectives, but in a board capacity, project managers will begin to *create* a strategy. Thus, project managers will develop the other side of the "strategic coin" and become skilled at not just strategic execution, but strategic thinking as well. Think ahead to your next bidding process or project status update and how much better prepared you will be by having a true cross-functional understanding of how an organization runs.

Similarly, board service will help develop another skill that many project managers may have less experience with: ownership. By definition, we all know that projects are temporary. This can sometimes provide an actual or emotional "out" for project managers, who after a six-month project, may be able to leave the project and never have to deal with any difficult repercussions. However, in serving as a board member, there are *no* temporary decisions and *no* temporary outcomes. A board member must make long-term decisions and consider all implications before acting or voting; in most cases, he or she will be tasked with monitoring the decision or initiative to ensure the desired outcomes are achieved and *then* sustained.

Networking

Similar to the above benefit of developing new perspectives, the experience of serving on a board can provide project managers with a wealth of value from networking with executives. However, the networking should *not* be focused on networking for jobs or new project opportunities; rather, here, the most important type of networking benefit is *knowledge networking.* Boards are likely to include several

members who are or were successful industry executives and who project managers can learn from and model, in terms of communication, style, and executive presence. These lessons can then be applied to future projects.

In addition to these executives, boards can also include industry or cause-specific leaders who can provide a wealth of knowledge regarding serving the community, working with the government, and helping those in need. Project managers can use these relationships to help develop *their own* skill set, which focuses on giving back to the community. Throughout these experiences, project managers should be aware of how the business world interacts with the community and identify ways it can be done better. Just as a project manager may transfer project management best practices to the board, project managers should not overlook the great ideas these community leaders have, which may be applicable to *their* projects.

If done successfully, your professional and community co-workers will be coming to you for knowledge on navigating the "two-way street" between the professional world and the community.

Leadership Skills Development

Finally, the experience of serving as a board member will have many indirect impacts on a project manager's professional persona. Specifically, you will be working with and modeling executives to help fine tune your own leadership style. This is important, because *A Guide to the Project Management Body of Knowledge (PMBOK® Guide)*—Fourth Edition, stresses the role of interpersonal skills in the management of project teams (Project Management Institute, 2008, p. 240). By further developing these important soft skills through working with board members and community leaders, project managers will enhance their ability to motivate project team members to achieve their collective objectives. This is a skill that applies equally to both professional and personal endeavors. Board experiences will also help strengthen decision-making skills because of the focus on accountability, long-term considerations, and community impacts. Each decision made as a board member and each new networking contact will be additional parts in the development of the project manager's professional persona and will help promote better results through effective leadership.

Looking Forward by Giving Back

Choosing to become a board member is an important decision that requires extensive commitment and

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responsibility. This article highlighted *some* of the relevant skills and benefits that project managers should consider when making that decision and it also highlighted some of the benefits of this unique opportunity. For project managers who choose to take on this challenge, it's important to remember that the more you *learn*, the more you can *achieve*.

In this light, joining a board is not the end result of your community service interest, but rather the beginning of a new personal and professional learning process. The experiences and skills you develop through board service will help ensure that you continue to grow and challenge yourself both as an individual and a professional. The more you learn, the more you can give back and the cycle will repeat itself, because you will be able to make a greater footprint in your community and as a leader *wherever you* go. Through your investment as a community leader, you will serve as another example of the importance and applicability of our chosen profession, project management!

References

Project Management Institute (PMI). (2008). *A Guide to the Project Management Body of Knowledge* (*PMBOK® Guide*)— Fourth Edition. Newtown Square, PA: Author.

About the Author

David Ciriello is a Project Management Professional (PMP ®) and Project Management Institute Scheduling Professional (PMI-SP ®) credential holder with six years of project management and project management office experience. Mr. Ciriello has supported or led many IT and business initiatives for executive leadership in the areas of strategic planning, risk management, governance, process improvement, and status reporting.

Mr. Ciriello is a graduate of Oxford University and is based in New York City, where he focuses on the public sector. He is an active community volunteer and currently serves on the not-for-profit board of directors for a New-York based 501(c)(3) not-for-profit organization. Mr. Ciriello is a member of the PMI New York City Chapter and can be reached at david.ciriello@alumni-oxford.com.

Appendix A – Sample of an Individualized Fundraising Road Map

ID	⊕	Task Name	Duration	Start	Finish	Predecessors
0		XYZ Board - John Doe - Fundraising Road Map	54 days	Wed 6/16/10	Mon 8/30/10	
1		Set Personal Fundraising Goal	4 days	Wed 6/16/10	Mon 6/21/10	
2		Speak with Board	1 day	Wed 6/16/10	Wed 6/16/10	
3		Discuss with Family	2 days	Thu 6/17/10	Fri 6/18/10	2
4		Finalize Goal	1 day	Mon 6/21/10	Mon 6/21/10	3
5		Set Personal Fundraising Goal - Complete	0 days	Fri 6/18/10	Fri 6/18/10	2,3
6		Draft Appeal Letter	6 days	Mon 6/21/10	Mon 6/28/10	
7		Create First Draft	3 days	Mon 6/21/10	Wed 6/23/10	5
8		Review First Draft with Fundraising Committee	1 day	Thu 6/24/10	Thu 6/24/10	7
9		Update and Finalize	2 days	Fri 6/25/10	Mon 6/28/10	8
10		Set Personal Fundraising Goal - Complete	0 days	Mon 6/28/10	Mon 6/28/10	9
11		Identify Appeal Letter Recipients	8 days	Tue 6/29/10	Thu 7/8/10	
12		Identify 5 Family Members	1 day	Tue 6/29/10	Tue 6/29/10	10
13		Identify 5 Co-workers and Friends	2 days	Wed 6/30/10	Thu 7/1/10	12
14		Develop 5 New Contacts	5 days	Fri 7/2/10	Thu 7/8/10	13
15		Identify Appeal Letter Recipients - Complete	0 days	Thu 7/8/10	Thu 7/8/10	14
16		Hold Fundraising Event at Home	9 days	Fri 7/9/10	Wed 7/21/10	
17		Select Date	1 day	Fri 7/9/10	Fri 7/9/10	15
18		Draft Letter and Email Invitations	3 days	Mon 7/12/10	Wed 7/14/10	17
19		Order Food	1 day	Thu 7/15/10	Thu 7/15/10	18
20		Set up Home	1 day	Thu 7/15/10	Thu 7/15/10	18
21		Finalize Attendee list	1 day	Thu 7/15/10	Thu 7/15/10	18
22		Prepare Presentation	3 days	Fri 7/16/10	Tue 7/20/10	21
23		Conduct Fundraising Event	1 day	Wed 7/21/10	Wed 7/21/10	22
24		Hold Fundraising Event at Home - Complete	0 days	Wed 7/21/10	Wed 7/21/10	23
25		Contact Giving Agencies	18 days	Thu 7/22/10	Mon 8/16/10	
26		Conduct Web Search of Keywords	5 days	Thu 7/22/10	Wed 7/28/10	24
27		Identify Organizations with Similar Interest	3 days	Thu 7/29/10	Mon 8/2/10	26
28		Send Appeal Letter	2 days	Tue 8/3/10	Wed 8/4/10	27
29		Follow-up with Phone Calls	3 days	Thu 8/5/10	Mon 8/9/10	28
30		Process Additional Donations	5 days	Tue 8/10/10	Mon 8/16/10	29
31		Contact Giving Agencies - Complete	0 days	Mon 8/16/10	Mon 8/16/10	30
32		Research Company Matching Options	4 days	Tue 8/17/10	Fri 8/20/10	
33		Contact HR	1 day	Tue 8/17/10	Tue 8/17/10	31
34		Complete Matching Form	2 days	Wed 8/18/10	Thu 8/19/10	33
35		Update Total Amount	1 day	Fri 8/20/10	Fri 8/20/10	34
36		Research Company Matching Options - Complete	0 days	Fri 8/20/10	Fri 8/20/10	35
37		Report Back to the Board	6 days	Mon 8/23/10	Mon 8/30/10	
38		Prepare Presentation	3 days	Mon 8/23/10	Wed 8/25/10	36
39		Create Chart	2 days	Thu 8/26/10	Fri 8/27/10	38
40		Present to the Board on Fundraising Results	1 day	Mon 8/30/10	Mon 8/30/10	39
41		Report Back to the Board - Complete	0 days	Mon 8/30/10	Mon 8/30/10	40
42		XYZ Board - John Doe - Fundraising Road Map - Complete	0 days	Mon 8/30/10	Mon 8/30/10	41