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A project of the American Association of Homes and Services for the Aging with funding from the Robert Wood Johnson Foundation.

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Involving Consumers on Boards

ABOUT THIS BRIEF

Many organizations try to recruit consumers for their boards, but few know how to utilize those consumer board members in an effective way. In this brief we explore how you can best recruit and keep consumers on your organization's board.

Special thanks to this month's guest author, Dr. Paul Weaver of the Kentucky Center for Mental Health Studies.

Getting consumers to serve on your board can be difficult. Getting consumers who are knowledgeable about serving on boards can be even more difficult. However, including at the table those who are most impacted by your services and decisions is a great opportunity with valuable benefits.

Recruiting Consumers to Serve on Boards

The first step in involving consumers on your board is recruitment. It is important to recognize that not every consumer is a good fit for a board. First and foremost, the consumer must be one who has personally experienced the impact of your board's (or a similar board's) policies and practices.

Next, it is essential that you select individuals who are not afraid to speak up and speak out at meetings. However, they also should understand the need to cooperate, compromise and collaborate. Consumers on boards may find themselves feeling pressure both from board members as well as from the consumer community. They need to be able to maintain their independence while working with the group to accomplish their task. You should also think about bringing consumers on board who have the respect of the consumer community and will not appear to be co-opted by the other board members.

It is also a good idea to bring more than one consumer on board at one time. There are several reasons for doing this. A lone consumer may need the support of another consumer to feel strong enough to speak up. One person alone is easily intimidated, especially when the board is composed of highly educated professionals or people who traditionally hold positions of power and influence in the community.

CONSUMER COMMENT

"I was excited about being asked to be on the *** Mental Health and Mental Retardation Board, but I also was scared. The people on the board were a lot of bigwigs. And my doctor was on the board and I knew I would probably see people on the board or at the meetings that knew all about my suicide attempts. I found myself really wondering whether I could do it. I had not even finished high school and furthermore couldn't even drive. I was on Medicaid and disability. I had never been asked to be in such an important position. I felt a lot of stress. But I was proud they chose me."

Consumers may also go through periods of illness while serving on a board. Having at least one more consumer may ensure that one is always at the table. It also makes a statement that your organization is serious about hearing consumers rather than using them as token members of your board.

It is wise to rotate all board members on and off at various intervals to prevent burnout or paternalism. The rash of current corporate scandals points to the wisdom of this strategy. This is extremely important as far as consumers are concerned as well. A new consumer will refresh the board, while giving the other consumers a rest.

Finally, you will need to know where to locate consumers. Obviously, you can advertise. You might also think about turning to a consumer-controlled group or entity to obtain recommendations for potential board candidates. It is wise to have *all* board members have to fill out an application before being approved and appointed to a board.

Retaining Consumers on Boards

It is one thing to get consumers to serve on your board. It is another thing to keep them there. Consumers must know what is expected of them, and boards must know how they can best support consumer board members. Here are some steps that you can take to ensure continued consumer participation on your board:

1. Boards must realize that many consumers face a key issue before they can serve on a board: transportation. Lack of transportation is a major problem for many consumers who do not drive or who cannot afford a vehicle. Also, some consumers live outside the reach of public transportation. You should be prepared to make provisions or pay for transportation for consumer board members to all board and committee meetings. Apprehension about transportation can discourage participation.
2. Consumers need to know up front exactly what is expected of them. When will meetings be held? Where will they be held? How long will

they be? Consumers can grasp their roles quickly when the expectations for board members are clearly stated, preferably in writing.

3. You must provide board training. Most consumers have never served on boards or councils before. This means someone in your organization must take on the responsibility to see that the consumer understands boards—fiduciary responsibilities, officers, decision-making processes, agendas, etc. Consumers also need to learn about the political nature of boards and the importance of understanding board dynamics and interpersonal relationships. The three major issues about your organization that all board members—consumers and others—must understand are corporate structure, daily operations and finances. Few board members realize the liability that a board member could face if something goes wrong. Giving the consumer a copy of your articles of incorporation, by-laws, past minutes or reports may be helpful. Also, consumers may enjoy reading books that help them understand corporations or meetings better. Plus there are a number of Web sites and articles that can assist consumers in learning more about being a board member and how boards operate. (See page 4 for some examples.)
4. It is essential that current board members, particularly your board chair, make the consumer feel at ease. This means making a deliberate attempt to see that consumers are treated fairly and respectfully. It also means encouraging consumers to participate in the debate by asking them directly for their thoughts. In private or during breaks, the chair should seek consumers out to demonstrate concern for their comfort and respect for their opinions.

CONSUMER COMMENT

“I was the president of our consumer group, but our board meetings were always a mess. Everyone was always fighting with each other, so I did not know what to expect on this new board. Fortunately, the state had a program where consumers could go through a two-day training on serving on boards, and I took that. It helped me understand a lot better what was expected of me. The CMHC also had a board orientation that was helpful. Right away, we had a board retreat and it helped me get acquainted with the other people. Some were snobs, but the others were pretty nice to me. The chairman was a local politician and she was very kind to me. I felt more at ease because several came up and talked to me and made me feel welcome. But I felt very self-conscious and very stressed.”

5. Boards that inform their board members well in advance about the issues are progressive. Well in advance of a meeting, consumers should have printed materials on the agenda, issues to be discussed and decisions that need to be made. This way the consumer can call the chair and discuss issues in advance to gain insight or can research the issues and formulate ideas before getting to the meeting.
6. The chair has the responsibility to moderate meetings that follow the agenda, stay on schedule, and are orderly and peaceful. While this is helpful for all board members, it is especially important for consumers with illnesses or disabilities.
7. Debriefings are often a good way to assist a consumer in her understanding of what transpired at the meeting, how she did, and what improvements she can make in order to become a great board member. Social workers, clergy, case managers, psychologists and other consumers are often most suited to do this. And it might also be helpful to offer a mentor to the consumer for the first few months she serves on the board.

Rewarding Consumers for Serving on Boards

A strange thing frequently happens when consumers are asked to be members of councils, committees and boards. The consumer find himself surrounded by other board members who are being paid by their companies or jobs to be there. Consumers—especially those with disabilities—may have limited resources and often may have many extra expenses due to their illness or disability. Yet they are often the only ones at the table who are not being paid for their time. An honorarium of \$50 to \$200 per meeting is fair and appropriate. This is in addition to the board paying for any attendants and transportation that consumers may require.

Another way to reward consumers is by considering them for election to board offices, just like any other board member. Also, you can extend service awards to them and recognize them, along with the other

board members, at public gatherings of your organization.

However, one of the most rewarding things that consumers can receive is the passing comment that praises them for their conduct and contribution to the board. Consumers, like all of us, enjoy approval—especially from non-consumers.

CONSUMER COMMENT

“I was surprised to receive a \$100 check in the mail after the retreat. Later, I learned that they were going to give me \$50 for each meeting, and they worked out a ride for me with a board member who lived in my town. I used the \$100 towards the bike that I had wanted to buy. I felt pretty good about that. I don’t get much extra money very often.”

Recognizing Our Responsibility

CONSUMER ADVOCATE COMMENT

“It is not easy for people who have never had a disability to understand how a consumer looks at the world. That’s why it’s important to spend time talking to consumers and attending their events, such as state or national conferences. I have also found that people change their thinking when they ask me how I think or how consumers think about something.”

In light of the most recent corporate scandals, we have all learned about board members who were uninformed or misinformed about the finances of an organization. We have seen corporations whose boards had lost control of the internal management and trusted others to be honest and mind the store. We have seen how corporations that are not willing to be open and just in their dealings can lead board members astray and even to jail. Thus, we must remember our responsibilities well.

It is our responsibility to have those most impacted by our decisions be an integral part of the decision-making process. We must seek the independent thought of consumers in order to try to achieve a comprehensive evaluation of our operation. This

means putting consumers on boards as full voting members and even as officers. This can bring an openness and alertness to your organization that can help to make you sound organizationally, circumspect financially, safe legally and satisfied individually.

Some resources for you and your board...

Online Resources

RIGHT FROM THE START - A HANDBOOK FOR NOT-FOR-PROFIT BOARD MEMBERS

www.oag.state.ny.us/charities/duties.html

Sponsored by the Charities Bureau of the New York State Office of the Attorney General, this Web site offers an overview of how to be an effective board member, including what you need to do before joining a board, your duties as a board member, and other resources.

NONPROFIT FAQ

www.nonprofits.org/npofaq/keywords/1a.html

Sponsored by the Evergreen State Society's Internet Nonprofit Center, this on-line resource provides answers to frequently asked questions about serving on a board.

Print Resources

A GUIDE FOR BOARD MEMBERS OF NONPROFIT ORGANIZATIONS

United Way of the Capital Area

www.uwcact.org/opportunities/Board%20Members%20Guide.pdf

Provided as a public service by the Nonprofit Resource Center of the United Way of the Capital Area (in Hartford, CT), this report provides information to board members of charitable organizations about their responsibilities.

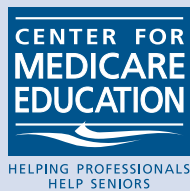
MEANINGFUL PARTICIPATION: CONSUMERS SERVING ON ADVISORY BOARDS

Kentucky Center for Mental Health Studies

This manual is designed to help consumers who have never served on advisory boards understand their roles and responsibilities. (A video is also available.) To order, call: 1-859-226-9096, or write to: KCMHS, P.O. Box 12065, Lexington, KY 40580

About the Author

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