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Engaging Your Board Case Study: It's everyone's job to know your customers

Joanna was on the board of a group providing classes in financial literacy and entrepreneurship to single mothers. The organization had been praised for its curriculum, and reaction from those who attended the class was very positive – they were in command of their finances, and some were even working on plans to start their own small businesses.

However, there was a large gap between the number of women registered for the program and those actually attending the classes. The board was frustrated that poor attendance was limiting their impact, especially since they knew the class costs were fixed regardless of the number of attendees.

Both board and staff had tried a number of approaches to address this issue and after multiple meetings had focused on the class schedule. The classes had started out as day classes, but the board, hypothesizing that most of the women had to work during the day, asked staff to move the class to the evening. The move seemed to have no effect on participation.

Joanna, a brand manager for a consumer products company, hadn't really thought her work experience relevant to the organization. Mostly, she had enjoyed the networking involved in the role and was happy to assist with fundraising. As she listened to the discussion of the attendance problem, however, it occurred to her that one of her main mandates at work was to know her customers and their needs. She wondered why the staff hadn't queried attendees directly about their class attendance.

When Joanna brought this concern up with John, the board chair, he agreed with the concern, but said the staff had their hands full organizing, marketing, and executing the classes. At the next board meeting, Joanna referred to this conversation, noting that while she understood the need to get new participants to fill the classes – something that it was quite costly to do – it might make more sense to focus on upping the attendance of the women who were already registered. Doing so, she explained, took really getting to know them and the challenges they faced.

Beth, the Executive Director, was understandably defensive upon hearing this. She had developed close relationships with the women attending the class, and had been working hard to serve them. At this point, Joanna, realizing that she had not been clear and perhaps not as thoughtful as she could have been in raising the concern, assured Beth that she was impressed by the way she related to program participants and stressed that Beth was largely responsible for the praise the program had received. Deciding to reframe the issue not as a failure but as a challenge Beth faced, Joanna noted that the director had her hands full with the program and had no time to talk to participants about issues other than the class, let alone time to talk to registrants who were not attending.

Beth agreed with Joanna's assessment and then asked if she and some other volunteers would be willing to place calls to those who did not attend the classes and find out why they were not attending. The calls amounted only to an hour of work for three board members. In turn, Beth asked attendees after class about practical measures they had to take to be able to attend. Almost immediately, it became clear to all involved that those who did not attend lacked childcare, regardless of the time of the class. Those who did attend, it turns out, had a mother or friend nearby who could help out during the class time.

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As a result, the organization teamed up with a nonprofit offering after-school programming to children, and timed the classes to coincide with this programming. The board then arranged to have all registrants contacted to let them know about the childcare option. Within months, attendance shot up at both programs. Ultimately, the programs combined marketing efforts and shared the registration process, keeping one file on each mother-child pair, thus cutting costs for both agencies.