

**The Roles We Play: A Study of the Public Relations Roles
Nonprofit Organizations' Board Members Play**

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Abstract

A nonprofit organization's most visible volunteers, members of its' board of directors, play a vital role in sustaining the organization. A literature review suggested board members use public relations efforts to aid in accountability, communication, community outreach, fiscal governance, fundraising, and strategic planning efforts. Using Q-Methodology, this study found board members most frequently use public relations to establish community linkages. Board members also enact public relations roles to plan for the future of the organization, ensure financial accountability, and provide general support to the organization. Alarming, a sizeable number of board members stated they have no involvement in the organization's accountability efforts.

Key words:

board of directors, public relations, communication, fundraising, volunteers

Despite the diverse missions of the 1.25 million nonprofit organizations in the United States, these organizations face similar problems, such as fundraising (Kelly, 1998), volunteer management and recruiting (Callow, 2004) and issues involving transparency and accountability (Hofer, 2000). To address these concerns, individuals are appointed to the organization's board of directors to guide the organization and its programs or services (King, 1994). The purpose of this study is to determine how nonprofit organizations use their board members to serve in different public relations roles.

Literature Review

King (1994) estimates that the average board of directors for nonprofit organizations has between 12 and 15

members. With each member possessing different skills, nonprofit managers are able to utilize their boards in diverse areas. Researchers have found 6 categories where board members most often offer guidance: accountability issues, communication practices, community outreach, fiscal governance, fundraising, and strategic planning.

Accountability

The board of directors bears ultimate responsibility, authority, and accountability (Pointer & Orlikoff, 2002) for the organization's governance and programs. Board members must see that nonprofit organizations are accountable to their stakeholders in three manners:

- (1) the mission and purpose of the organization must be carried out,

- (2) the organization must continually be productive and moving toward a specific goal or outcome, and
- (3) there must be no improper use of resources or conflicts of interest (Green, 2004, p. 25).

Communication

Increasing the communication with an organization's stakeholders can lead to beneficial results in fundraising, volunteer recruitment, and increased satisfaction among community leaders. The board can work to increase an organization's reputation in the community by developing a communication plan revolving around central messages relevant to key stakeholders. Neal (2001) points out that board members use both interpersonal and mass-mediated channels to reach their stakeholders.

Community Outreach

As Holland (2002) notes, board members must strive to keep abreast of the changes in the organization's operating environment and the organization's clients. Through outreach to key community stakeholders, board members are able to form strategic alliances (Hesselbein, 2004) and financial sponsorships with businesses (Lenkowsky, 2002). Board members should also use their community out-reach efforts to reach more clientele for the organization (Axelrod, 1994) and recruit new volunteers (Bradshaw, Murray, & Wolpin, 1992).

Fiscal Governance

Umapathy (1993) identified five key areas of fiscal management that board members must constantly be evaluating: the cost of missing opportunities to implement good ideas, financial crunching during weakened economic periods, uncontrollable costs (e.g., litigation expenses), reaching forecasted revenues, and scrutinizing the

organization's budget. Iecovich (2004) maintains that board members must take an active role in the "approval of an organization's annual budget, fiscal oversight and effective money management, audit, assist in fundraising, [and managing] investments" (p. 6).

Fundraising

All board members are expected to make a significant annual contribution to the organization (Brunetti, 1995); however, that is not enough. Board members are also expected to introduce their family, friends, and business contacts to the organization and frequently discuss the nonprofit with them (Hager, Rooney, & Pollack, 2002). Additionally, board members should also attend meetings with major gift donors, foundations, and corporate sponsors (Kelly, 1998).

Strategic Planning

Strategic planning is most often viewed as the creation or revision of a mission statement and vision (Reynolds, 2002). Board members are encouraged to develop quantifiable, time specific, and briefly worded goals along with specific objectives and tactics to meet these goals (Tweeten, 2002; Pointer & Orlikoff, 2002). Nonprofit scholars have also suggested that strategic planning should include planning fundraising (Kelly, 1998) and diversification of the board (Hesselbein, 2004).

Public Relations

Though these six areas appear different, they all involve varying degrees of public relations activities. Public relations is "the management function that establishes and maintains mutually beneficial relationships between an organization and the publics on whom its success or failure depends" (Cutlip, Center, & Broom, 1994, p. 1). For

all six categories, solid relationships play a vital role in the organization's survival.

Board members use public relations activities to connect to the community to see how external changes will impact the organization. However, a board member's time is limited, and members are usually not financially compensated for the time and energy they contribute to a nonprofit. Therefore, it is nearly impossible for one board member to address all of the needs of an organization. To determine how nonprofit organizations utilize their board members, this study was guided by the following research question:

What are the main public relations roles that individuals take on while serving as nonprofit board members?

Even though the literature points out six key areas, nonprofit organizations obviously do not have board members focusing on all areas as scandals in the nonprofit sector continue to surface.

Methodology

To determine which public relations roles were most often enacted, board members at four diverse nonprofit organizations evaluated 48 activities common to boards of directors. Using a Q-Methodological design, the board members evaluated the statements on an 11-point Likert scale (-5 to +5) based on how frequently they perform the activities. The activities were chosen after a thorough literature review, interviews with nonprofit executive directors, and a focus group of board members. They are listed in Table 1 by category.

The resulting rankings for all board members were factor analyzed using varimax rotation with the PQMethod 2.09 software package. In Q-Methodology, the participants are viewed as variables rather than the activities they sorted. Therefore, the resulting factor loadings reveal which people have similar rankings. After the statistical outcomes are received, the researcher then interprets the rankings to further understand the factors.

Results

The board members of four nonprofit organizations (n = 49) completed the Q-sort at their annual retreats. Each organization represented a different aspect of the sector: arts and culture, health, and two from the social service sector focusing on child welfare and homelessness. Two of the organizations had budgets of more than \$1 million per year; the others had operating budgets less than \$300,000 per year. An effort was made to work with organizations with different budgets to see how organizations with varying resources for public relations efforts utilize their board members.

Four factors emerged as being common public relations roles that board members enact while serving the nonprofit organizations. All but two of the participants had statistically significant loadings on at least one factor. An analysis of the factors revealed four distinctive public relations roles that board members enact: (1) The Strategists, (2) The Connectors, (3) The Financiers, and (4) The Generalists. Table 2 presents the breakdown of the participants on the factors.

Table 1
List of the public relations activities sorted by classification*

Accountability	1. I work with others in the organization to decide what information will be included in the annual report.
	7. I work with the organization's executive director to make sure overhead costs are kept at a reasonable level.
	13. I work with others in the organization to conduct regular financial audits.
	19. I help to define what investment strategies the organization will pursue with its endowment/savings.
	25. For each board meeting, I demand high quality financial reports that reveal the latest information on the organization's cash flow, balance sheet, and income and expense statements.
	31. I strive to make sure our programs and services are reaching the groups they are designed to help.
	37. I strive to make sure our programs and services are working to meet our mission.
	43. When problems arise within the organization, I work to resolve them quickly.
Branding and Writing	2. I contribute content for the organization's press releases and public service announcements.
	8. I write a column or article for the organization's newsletter or magazine.
	14. I work with the organization to develop content for the Web site.
	20. I take photographs of our programs/services/performances to use in the organization's publications and Web site.
	26. I am actively involved in developing talking points for the organization.
	32. I worked with others in the organization to design the logo, letterhead, envelopes, and business cards.
	38. I play a role in designing the organization's communication strategy to reach our key stakeholders.
	44. I write personal thank you notes to financial, political, and social supporters.
Community Outreach	3. I participate in recruiting new board members.
	9. I actively recruit new volunteers for the organization.
	15. I discuss the organization and programs with my family, friends, and co-workers.
	21. I attend conferences and meetings on my own time to learn more about issues that affect the organization.
	27. I give speeches to community groups on behalf of the organization.
	33. I serve as a media spokesperson for the organization.
	39. I participate in planning special events for the organization's key constituents.
	45. I frequently introduce the executive director and key organization employees to people I think ought to become involved with the organization.

Fundraising	4. I host fundraising events for the organization.
	10. I attend fundraising events given by the organization.
	16. I have introduced my organization to corporate contacts to develop sponsorships for the organization.
	22. I attend meetings and events given by foundation representatives.
	28. I actively participate in the organization's annual fundraiser by making significant donations.
	34. I actively participate in the organization's annual fundraiser by contributing names and addresses of possible donors.
	40. I attend appointments with major gift donors when asked by the executive director or development officer.
	46. I work with the organization to plan its annual fundraising campaigns and activities.
Organizational Advancement	5. I play an active role in hiring and evaluating the performance of the organization's executive director.
	11. I plan an active role in hiring and evaluating the performance of the organization's staff.
	17. I work with the executive director to plan the agenda for the board meetings.
	23. I work to develop relationships with professionals outside the organization (e.g., accountants, lawyers) to receive pro bono assistance for the organization.
	29. I work with the organization to conduct and evaluate research on the services and programs.
	35. I read materials distributed to the board before attending board meetings so I am able to participate actively in discussions.
	41. I play an active role in developing and evaluating the organization's key vision and mission.
	47. I lobby on behalf of the organization to local and state political leaders.
Strategic Planning	6. I am involved in setting the organization's annual goals.
	12. I look forward to sessions where the organization's services are examined.
	18. I play an active role in evaluating the organization's programs.
	24. I keep an eye on the legal and political environments to see what developments may impact my organization.
	30. I identify areas within the organization that we can use to strengthen our existing relationships.
	36. I identify areas within the organization that can hinder our existing relationships.
	42. Before I make organizational decisions, I think how the vote will impact our stakeholders.
	48. I strive to bring diverse voices to our board meetings so we hear multiple sides of the issue.

* The Q-statements are numbered so that the statements of one category are not numbered sequentially.

Table 2
Frequency Distribution of Statistically Significant Loadings on the Resulting Factors*

Factor Name	Significant Positive Loadings	Significant Negative Loadings
Factor A: The Strategists	11	1
Factor B: The Connectors	14	0
Factor C: The Financiers	10	4
Factor D: The Generalists	13	0

*As defined by the PQMethod 2.09 software, factor loadings were significant ($p < .01$) when the resulting correlation was .50 or higher. Some participants loaded positively on more than one factor.

Factor A: The Strategists

After examining the datasets of the participants who had significant loadings on Factor A, the first factor was termed “The Strategists.” The literature review stated the areas of public relations activities were interrelated, and the analysis of this factor supported this statement. Figure 1 presents the rankings of the individuals with statistically significant factor loadings on Factor A. The activities that received the highest evaluations came from all of the

categories that emerged from the literature review. As nonprofit scholars suggested, strategic planning was not limited to the evaluation of the organization’s goals, mission, and vision. Based on their rankings, individuals used strategic planning in every aspect of the organization, including communication, outreach, and fundraising. “The Strategists” was a bipolar factor as one individual negatively evaluated the strategy activities.

Figure 1
Factor Array for “The Strategists.”

-5	-4	-3	-2	-1	0	+1	+2	+3	+4	+5
20	22	8	39	16	5	19	46	24	38	18
2	11	10	17	28	26	42	12	21	41	6
	33	13	9	1	37	47	36	45	30	
		4	40	14	35	29	43	23		
			32	34	3	48	27			
				15	25	31				
					7					
					44					

Factor B: The Connectors

Factor B is the largest of the four groupings. Participants in this factor view their roles as being bridges between the organization and the community. They sought to reach out to others in the community and invite them to be part of the organization. Much like the first factor, “The Connectors” are actively involved in all aspects of nonprofit leadership. Figure 2 displays this group’s factor array. While

recruiting volunteers and new board members are among the top activities, these participants also are involved in advocating to political leaders, hosting fundraising events, and introducing the community to the organization. Because it appears that these individuals are used primarily to bring others to the organization and to get them involved, this factor was termed “The Connectors.”

Figure 2
Factor Array for “The Connectors.”

-5	-4	-3	-2	-1	0	+1	+2	+3	+4	+5
46	32	5	36	5	37	27	15	4	42	9
11	14	18	22	2	17	30	10	45	3	48
	28	41	1	29	35	38	25	44	31	
		20	12	7	16	23	34	47		
			19	13	8	2	26			
				43	39	40				
					24					
					21					

Factor C: The Financiers

Factor C is a bipolar factor with 10 positive loadings and four negative loadings. Unlike the first two factors, these participants did not perform activities from all areas identified in the literature review. Instead, they consistently rated accountability and fundraising activities highly (See Figure 3 for the complete ranking). Because of the factor’s strong focus on money, this factor was labeled “The Financiers.” The

individuals who loaded positively on this factor are primarily concerned with the fiscal health of the organization. They demand quality fiscal reports and are actively involved in the organization’s investment strategies. Additionally, they were involved in fundraising activities to ensure that the organization was financially secure. The individuals with negative loadings on this factor indicate that the financial management of the organization is not an activity in which they participate.

Figure 3
Factor Array for “The Financiers.”

-5	-4	-3	-2	-1	0	+1	+2	+3	+4	+5
2	20	34	9	18	5	37	6	28	13	7
8	41	14	11	4	22	26	43	1	25	19
	21	36	46	42	29	3	10	16	33	
		32	47	35	44	31	23	40		
			27	39	17	38	24			
				12	48	15				
					12					
						23				

Factor D: The Generalists

Whereas the first three factors focused on specific types of public relations activities, the fourth factor represents them all in many ways. For this reason, the final factor was named “The Generalists.” This factor had 13 participants with significant positive loadings. They felt their public relations roles covered many different areas rather than concentrating on a specialty. As Figure 4 shows, the rankings show that individuals favorably evaluated activities that were ranked highly by the previous

3 factors. These participants were involved in conducting research to help with strategic planning, reaching out to stakeholders in the community, and assisting in the fundraising campaigns. One unique activity that this factor identified as important to their board membership involved the regular board meetings. These individuals valued the meetings and the time that went into them. They not only read all of the materials for the meetings, but they also actively participated in them.

Figure 4
Factor Array for “The Generalists.”

-5	-4	-3	-2	-1	0	+1	+2	+3	+4	+5
38	24	21	48	41	14	10	8	27	46	15
47	33	28	16	3	29	1	25	37	34	17
	19	18	13	22	6	45	9	35	39	
		32	40	2	7	20	31	26		
			11	30	43	42	44			
				36	5	4				
					12					
						23				

The Remaining Participants

There were two participants who did not have a significant loading on any of the factors. Reflecting a public relations technician role, the first of these participants evaluated all of the writing statements very high, and the second favored all of the fundraising activities. Had there been others who were highly active in these areas alone, additional factors might have emerged. Their inclusion on the board for these nonprofits indicates that they might have

been recruited specifically because of their skills.

Discussion

It is interesting to examine the factors in relation to the four nonprofit organizations that participated in the study. Table 3 breaks down the board members of these nonprofits by the factors. All of the organizations had at least one board member on each of the factors; however, the differences tell an interesting story for the sector.

Table 3
Analysis of Board Members' Significant Loadings on the Four Factors by Nonprofit Organization.

Organization	Factor A	Factor B	Factor C	Factor D	No Factor
Healthcare (\$)	5	4	2/-1	3	0
Child Welfare (\$)	1	1	2	4	1
Arts (\$\$)	3	3	4	4	1
Homeless Services (\$\$)	2/-1	4	2/-3	4	0

(\$) = Organization with an annual budget less than \$300,000.

(\$\$) = Organization with an annual budget greater than \$1,000,000.

The child welfare organization had only one board member load significantly on either the strategy or community connection factor, and it only had two members who viewed their primary role as a financier; however, half of this organization's board members viewed themselves as generalists. This organization also had one of the participants who did not load on any of the factors, but felt his role on the board was one of serving as a communicator through writing and assisting with the group's publications and Web site. The resulting analysis for this organization mirrors how many nonprofits choose their board members (Schleck, 1985). This organization appears to identify specific needs within the board and seek individuals to fulfill those needs.

The healthcare and arts organization have well-rounded boards with all of the roles divided fairly evenly among the board members. As King (1994) points out, board members that take on distinct roles allow the chairman to establish subcommittees and get the board's work done easier. It is often more difficult to get some tasks done when the entire board insists on having a part in minor activities.

The arts nonprofit's board members are the most evenly divided of all the groups with three board members loading significantly on each of the strategy and connectivity factors and four members loading significantly on each of the financial and team player factors. Despite the nature of its board composition, there is some cause for concern. With the increasing demands

for accountability, it is alarming that one would have a negative loading on the financial factor. Even with other board members having significant positive loadings on the factor, a great challenge exists when any of the nonprofit's leadership views financial accountability as a low priority. The statements described the activities so they would not require a board member be an accountant or auditor to enact them. Therefore, negative loadings can truly become a hindrance to the nonprofit's long-term viability.

Even more alarming, the homeless services organization had three negative loadings on the same factor. This organization only had two board members say they actively participate in financial accountability activities. This organization's entire board completed the sorting, so it is unsettling that more board members avoid tasks that ensure financial accountability than actively participate in them. This organization also has one of the highest budgets of the nonprofits examined, so one would hope that the board would work to ensure the organization's longevity.

One possible explanation for the lack of a true financial consensus on the homeless services organization's board could come from the use of consultants. As Holland and Jackson (1998) note, the use of consultants is increasing in the nonprofit sector so that the nonprofit can focus on its programs and services. Further evidence of the role of consultants in this organization stems from the two significant positive loadings on the strategy factor. Both of these board members placed the statement, *I work to develop relationships with professionals outside the organization (e.g., accountants, lawyers) to receive pro bono assistance for the organization*, in one of the top positions. Nonetheless, the management of the organization should pursue board members

who will push for the financial security and integrity of the organization.

Looking at the entire overall picture of nonprofit board membership, it is interesting to note that the main roles that resulted from the Q-sort were slightly different from those highlighted in the literature on nonprofit board leadership. The areas that were found to be common among board members through the literature review were accountability, communication, community outreach, fiscal governance, fundraising, and strategic planning. Of the resulting factors, none directly came from the statements of only one of these different areas. For example, the strategy factor did not rely solely on the statements reflecting the tasks involved in an organization's strategic planning. The board members who participated in this study took a strategic approach to fundraising, community outreach, and communication.

The factor that did most closely resemble the literature was "The Financiers." The majority of this factor's top statements came from the accountability section. Board members felt they had a strong role in financially securing the organization's future and making sure that the organization's services and programs were being conducted at a reasonable cost that maintains the quality of the services. Board members with significant positive loadings on "The Financiers" also viewed themselves as playing a big role in the fundraising activities of the organization.

Of the 49 participants in this study, four had an overall negative loading on this factor, which signifies that they did not view either dimension of the factor (fundraising and accountability) as their responsibility.

Limitations

One of the main limitations of the research is the inability to generalize the results to the larger population because of

the qualitative nature of the analysis. However, the quantitative studies from which the literature review for this study was drawn did not reveal the subtle differences in how the 6 main categories were viewed by board members. Additionally, the resulting factors could be due to the organizations that were examined. With the massive scope of the sector, it is possible that different results could have been generated if additional types of nonprofit organizations, such as advocacy groups, membership organizations, or public policy research groups, were included.

The study also only explored four organizations; perhaps if additional organizations were studied, then more factors, such as a fundraising or a communication one, might have resulted from the statistical correlation of the Q-sortings. These additional factors might also have been revealed had the entire board participated at each of the four sessions. Eight additional board members were eligible to participate in the study. In 2 of the sessions, members of the board were unable to participate because of their absence from the regular meeting.

Future Research

The differences between this study's resulting factors and the nonprofit literature provide the main area for further inquiry. Even though there are some signs of similarities in how the board members viewed their roles in the areas of accountability, strategic planning, and community outreach, there were distinct differences from what the previous literature review had said were the dominant roles. By forcing participants to rank the 48 activities in relation to what tasks they routinely performed, it is possible to use the subjective datasets to see how board members see their roles in the organization. A future qualitative study can use in-depth

interviews and board documentation to further examine the level of interconnectivity of the board member's roles identified in the nonprofit literature. Perhaps, this study and future qualitative studies could provide a greater understanding of the role of the board member, and a more complex survey could be generated to test these results and provide the ability to generalize the results to the larger nonprofit community.

In the meantime, the results are encouraging for the field of public relations and the nonprofit organizations. Even though the board members may not have formal training in public relations, they are utilizing the field's best practices while working with the nonprofits. Strategic planning, regular evaluation of the organization's mission and services, and the consideration of all the organizations' stakeholders were reported as being common activities of all of the 4 boards. These practices should also help the nonprofit community overcome recent negative publicity stemming from scandals.

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