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# PREVALENCE AND PERCEPTIONS OF CLIENT/CONSUMER BOARD PARTICIPATION

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A Report Prepared for  
The National Assembly of National Voluntary Health and Social Welfare Organizations

September 1999

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*Prepared by BTW Consultants – informing change for the nonprofit and philanthropic sectors*

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# EXECUTIVE SUMMARY

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## INTRODUCTION

In the summer of 1998, the National Assembly of National Voluntary Health and Social Welfare Organizations (National Assembly) conducted a survey of nearly 1,300 local affiliates of national organizations. The Affiliate Survey is one of several research studies undertaken as part of the W.K. Kellogg Foundation-funded *Developing Client/Consumer Participation on Voluntary Human Service Boards* project.

The survey was designed to assess certain aspects of organizational governance, with a focus on client/consumer board participation, as well as attitudes and opinions regarding client/consumer participation. The purpose of this study is to contribute to the field's understanding of the prevalence and perceptions of client/consumer board participation from the perspective of a diverse set of community-based organizations.

## KEY FINDINGS

### *Organizational Overview*

- **Organization Type.** Essentially all of the 1,274 surveyed organizations describe themselves as providers of service. About half (51%) say they also have advocacy, education, and/or membership functions beyond their service-providing role.
- **Populations Served.** These organizations serve a wide range of populations: families, children and youth, low-income communities, ethnic/racial minority communities, people with disabilities, disaster victims, and the general population.
- **Board Primary Responsibility.** The boards of these organizations identify their primary responsibilities as fundraising (30%) and general and/or fiscal oversight (28%).
- **Board Recruitment.** Most boards (91%) recruit new members from current or former members.
- **Board Orientation.** 86% of surveyed organizations provide a formal board orientation or training program for new board members.
- **Methods of Obtaining Client Information.** About three-fourths of surveyed organizations (77%) obtain information on the opinions and needs of client/consumers from clients themselves.
- **Reimbursement.** Reimbursement for expenses related to board service is not routinely provided.
- **Board Reflection of Client Demographics.** The boards of these organizations *most* closely reflect their client demographics in terms of geography and *least* closely reflect their clients in terms of socioeconomic status.

### *Client/Consumer Board Participation*

- **Overall Prevalence.** 51% of surveyed organizations report to have client/consumers on board.
- **Recruiting Client/Consumer Board Participants.** More than half (56%) of surveyed organizations report difficulty recruiting client/consumer participants for board service.
- **Retaining Client/Consumer Board Participants.** Over half (55%) of surveyed organizations report no difficulty retaining client/consumer board participants.

### *Organizational Climate Regarding Client/Consumer Participation*

- **Formal Discussion about Client/Consumer Board Participation.** About two-thirds (60%) of surveyed organizations have had a formal discussion about client/consumer board participation.
- **Written Policy on Client/Consumer Board Participation.** About one-quarter (25%) have a written policy on client/consumer board participation.

- *Organizational Opinion of Client/Consumers on Board.* About two-thirds of surveyed organizations say having client/consumers on board is either advantageous (36%) or essential (29%).
- *Specific Attitudes towards Client/Consumer Board Participation.* On a summary-of-attitudes scale, about half of surveyed organizations (46%) score "high," meaning that they are open to client/consumer board participation.
- *Commitment to Client/Consumer Board Participation.* About half of surveyed organizations report their boards are either "supportive" or "very supportive" of client/consumer board participation.

#### *Difference in Climate Regarding Client/Consumer Board Participation by Organizational Traits*

- *Organization Type.* Organizations with advocacy, education, and/or membership functions appear to be more conducive for client/consumer board participation.

#### *Differences in Prevalence of Client/Consumer Board Participation by Organizational Traits*

The following types of organizations are more likely than their respective counterparts to have client/consumers on board:

- organizations with advocacy, education, and/or membership functions;
- organizations serving people with disabilities;
- organizations whose boards view advocacy as their primary responsibility;
- organizations that have had a formal discussion on the topic and those that have a written policy;
- those with high opinions, attitudes, and commitment regarding client/consumer board participation; and
- community-based affiliates of national organizations with national boards that practice client/consumer inclusion.

#### *Client/Consumer Participation and Board Diversity: An Intersection of Issues*

- Client/consumer inclusion increases board diversity. Organizations with client/consumers on board have boards that closely reflect the demographics of those they serve.

#### *Narrowing the Focus: Special Targeted Analyses*

- *Youth Participation.* Youth-serving organizations with youth client/consumer board representation, as compared with other youth-serving organizations: have significantly more positive attitudes about youth board participation; see there is an advantage to having youth client/consumers on their board; say client/consumer board members are readily accepted by other board members; and reject the notion that youth client/consumers do not have the skills needed for board service.
- *Overcoming Barriers.* Organizations serving low-income communities facilitate board participation for client/consumers by reimbursing for transportation and meal expenses. Alternative board meeting times, such as weekday evenings and weekends, facilitate board service for potential client/consumer participants such as youth.
- *National Membership Organizations and Affiliates: The Relationship for Organizational Climate.* Local affiliates are more likely to have had a formal discussion about client/consumer board participation if the national parent organization has had such a discussion. Also, affiliate organizations are less likely to agree that clients cannot afford the time or money needed for board service if the national organization does not perceive these barriers.

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## CONTEXT

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**What value is added to an organization that includes client/consumers on its board of directors?** This is the broad question that the National Assembly of National Voluntary Health and Social Welfare Organizations (National Assembly) set out to answer when, in 1996, it undertook a three-year initiative titled, **Developing Client/Consumer Participation on Voluntary Human Service Boards**. This initiative, funded by the W.K. Kellogg Foundation, is predicated on an assumption that engaging client/consumers on the boards of nonprofit organizations provides an opportunity to align an agency's mission more effectively with the needs of those it serves.

As a national membership organization, the National Assembly is particularly well positioned to examine this question. Drawing on its diverse network of national organizations and local affiliates, the National Assembly is able to access both national and community-based organizations in order to explore the experience with, and the experiences of, client/consumers on boards of directors. In its unique position, the National Assembly has been able to undertake three separate studies of the question of client/consumer board participation. Each study aims to shed light on different aspects and perspectives related to the question.

The National Assembly has conducted and reported on the following studies that have furthered the field's understanding of client/consumer board participation:

- ❖ *Clients on Board: Profiles of Effective Governance* – This report profiles the effective practices of ten national organizations that are models for client/consumer inclusion.
- ❖ *A Study of Client/Consumer Participation on National Voluntary Human Service Boards* – This study includes a description of the prevalence, attitudes toward, and impacts of client/consumers serving on the boards of the National Assembly's member organizations.
- ❖ *Youth and Board Service* – This report describes the experiences of nearly 200 young people who, as a client/consumer group, have participated in the organizational governance of community-based organizations.

Supplementing these research projects, the National Assembly sponsored a forum in the fall of 1998 called *Board Development – The Key to Client/Consumer Representation, Diversity, and Success*. This forum provided an opportunity to share the rewards experienced by national organizations that include client/consumers on their boards. In addition, the forum provided an opportunity to describe efforts to ensure that client/consumer board participation is a positive and effective experience both for the board member and the organization. In the spring of 1999 the National Assembly released the publication, *Broadening Representation in Nonprofit Governance: Thoughts on Expansion, Accommodation and Change*, based on the forum's proceedings.

Over the course of the project's evolution, important lessons have been learned about issues of definition. The survey of national organizations revealed that some national organizations define their client/consumers as their local affiliates while others define their client/consumers as the ultimate recipients of services. This finding served to encourage the project architects to design the current study of local affiliates of national organizations, recognizing that the definitional confusion would or should disappear at the local level. Indeed,

by focusing on community-based organizations the definition of client/consumers is more clearly and consistently perceived to be the ultimate recipients of services.

As part of the information-gathering efforts associated with this initiative, the National Assembly conducted a groundbreaking survey of nearly 1300 local affiliates of national organizations. The survey was designed to assess certain aspects of organizational governance, with a focus on client/consumer board participation, as well as attitudes and opinions regarding client/consumer participation. The purpose of this study is to contribute to the field's understanding of the prevalence and perceptions of client/consumer board participation from the perspective of a diverse set of community-based organizations. This report is based on the study findings.

## REPORT OVERVIEW

This report opens with the "Study Methods" section that describes the study approach, survey design, sampling, and analyses. The next section, titled, "An Organizational Overview: Focus and Governance" provides summary information on all organizations participating in the study with respect to their scope and purpose (including populations served) as well as details of governance such as primary board responsibility and board recruitment methods. The stage is set for further examination of client/consumer board participation in the section called "Organizational Climate Regarding Client/Consumer Participation;" here, an overview is presented of policies, discussions, attitudes, and opinions about client/consumer board participation.

The remainder of the report focuses very specifically on the prevalence and perceptions of client/consumer board participation. Overall prevalence of client/consumer board members and differences in prevalence by factors such as organization type, populations served, and primary board responsibility are discussed. Next, the "Client/Consumer Participation and Board Diversity" section presents a theoretical discussion of how the issues of client/consumer participation and board diversity intersect and provides survey findings that elucidate this intersection.

The report culminates with a section called, "Narrowing the Focus," which contains a series of targeted analyses. This final section offers a more detailed examination of the following:

- 1) Organizations that include client/consumers on board reflecting populations served;
- 2) Issues related to including young people in board service;
- 3) Issues related to including low-income communities in board service; and
- 4) Relationships between national organizations and their local affiliates regarding specific aspects of client/consumer inclusion.

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# STUDY METHODS

## SURVEY DEVELOPMENT AND SAMPLING

Project staff, in consultation with other experts in the field of board development, developed a self-administered "Survey of Client/Consumer Board Participation in Community-Based Organizations," to be completed by the executive director of community agencies. The survey was designed to conform as closely as possible to a survey that had been conducted previously with national organizations. The surveys could not be identical, however, given differences in the issues addressed by national, as compared with local, organizations; each survey was designed to be relevant for its respective audience.

The survey begins with the following definition of "client/consumer" for the respondent's reference: *For the purposes of this survey, "client/consumer" includes any person served by the programs and services that carry out this organization's mission and any person identified in this organization's mission as a client/consumer. You may refer to them as members, participants, customers, users, target population, residents, patients, students, parents, children, or another name. The generic term client/consumer is used to signify all of these people.*

The survey asked questions in the following content areas:

- organizational scope (i.e., service-providing and service-providing plus advocacy and education);
- methods of obtaining information on client needs;
- client/consumer participation;
- board characteristics (e.g., frequency of meetings, prevalence of board orientation programs);
- primary board responsibility;
- degree to which the board reflects agency client/consumers in terms of demographic characteristics; and,
- organizational climate and attitudes towards client/consumer board participation.

Project staff pilot-tested a draft version of the survey instrument with ten executive directors of local organizations not affiliated with National Assembly member organizations. Based on the pilot test, project staff refined and finalized the survey.

To distribute the final survey to community-based organizations, project staff requested from the National Assembly's member organizations mailing labels for all of their respective affiliate organizations for sending the survey out. Most national organizations provided mailing labels; those that did not sent the survey themselves in their regular mailing. With a postage-paid return envelope, the survey and a cover letter, requesting the executive director's response, were sent to all organizations in a National Assembly envelope. Of the 5629 surveys distributed, 1274 were completed and returned for a response rate of 22.6%.

## DATA ANALYSIS AND PRESENTATION

The quantitative data were entered in a Microsoft Access database and analyzed in the Statistical Package for Social Sciences (SPSS). Univariate analyses were conducted on all variables; frequencies are graphed throughout the report. Bivariate and multivariate analyses were conducted—including chi-square tests of independence ( $\chi^2$ ), one-way analysis of variance (ANOVA), and simple linear regression—to explore relationships between independent and dependent variables. For example, chi-square tests were conducted to investigate whether having client/consumers on board (a dependent variable) differs significantly across independent variables such as type of organization. Additionally, regression analyses and analysis of variance tests were conducted to know whether attitudes and opinions about client/consumer participation correlate with each other and whether they differ significantly across groups of respondents (e.g., different primary board responsibilities).

Responses to a final open-ended question, generating qualitative data, were entered into the same database. Content analysis was conducted to identify themes. Throughout the report, direct quotes from individual open-ended responses are used to illustrate points.

As mentioned, there is considerable and intentional overlap in content between this survey of community-based organizations and the survey of national membership organizations conducted by the National Assembly as part of this same project. The data from these two surveys were linked from local affiliates to that reported by their respective national parent organizations. This allowed for a comparative analysis of the findings from national membership organizations with findings from their local affiliates. This allowed for an examination of whether attitudes and practices related to client/consumer board inclusion at the national level correlate with attitudes and practices at the local level.

Tables and charts display the findings throughout the report. For each exhibit, the number of respondents represented is provided. In tables, numbers are rounded to one decimal place; in charts, percentages are rounded to the nearest whole number. Because of rounding error, the sum of percentages in a given chart may be one percentage point higher or lower than 100%. For exhibits where categories are not mutually exclusive (i.e., respondents could select more than one response option for a given question), the sum of percentages is greater than 100%.

## LIMITATIONS

Strictly speaking, the organizations surveyed for this study represent a convenience, rather than a random, sample. Organizations were enlisted to participate in the study based on their status as a local affiliate of one of the National Assembly's national member organizations. As a convenience sample, it is not technically accurate to generalize the study findings to the entire population of community-based organizations. However, the nearly 1300 organizations participating in this study represent a diversity of service types and target populations and comprise the most robust sample ever surveyed on the topic of client/consumer board participation. The sample size and normal distribution of the data lends confidence to the statistical analyses and findings. It is the opinion of these analysts that the use of a convenience sample does not significantly undermine the value of the findings contained herein.



# KEY FINDINGS

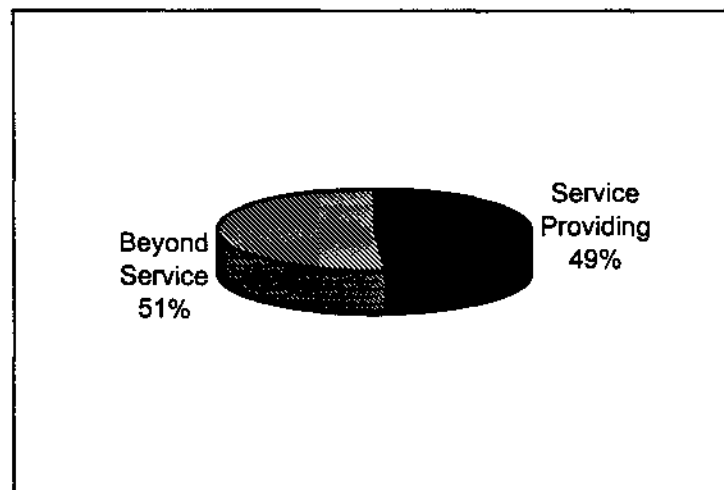
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## AN ORGANIZATIONAL OVERVIEW: FOCUS AND GOVERNANCE

### *Organization Type*

By their own description, essentially all organizations responding to the survey provide some type of service. About half (51%) do more than provide direct services; they also have advocacy, education, and/or membership functions. Exhibit 1 depicts the proportion of each organization type, grouped into "service providing" and "beyond service providing" (i.e., service providing plus advocacy, education and/or membership).

**Exhibit 1**  
**Organization Type: Service-Providing Only and Beyond Service Providing**  
(n=1265)



### *Populations Served*

The organizations participating in this affiliate survey serve a broad range of client constituents. Respondents were asked to identify the population(s) they serve; Exhibit 2 displays the proportion of organizations indicating service to each population type listed. The categories are not mutually exclusive and respondents could indicate all population types that apply. The intent is to capture those populations for whom organizations specifically target services.

**Exhibit 2**  
**Populations Served By Organizations**  
(n=1273)

<b>Population</b>	<b>Number</b>	<b>Percent*</b>
Families	697	54.8%
Children/Youth	653	51.3%
Low Income/Impoverished	571	44.9%
Ethnic/Racial Minorities	397	31.2%
General Population	349	27.4%
People with Disabilities	208	16.3%
Disaster Victims	174	13.7%

\* Please note: The total percentage is greater than 100% because respondents could identify multiple populations.

Over half of these organizations target services to families in general (55%) and children/youth specifically (51%). Under one half (45%) target services to low-income or impoverished people. About one-third (31%) target services to ethnic/racial minority groups.

It is important to note that just over one-quarter (27%) of organizations serve the general population (as indicated by a written response or by a check mark next to all or nearly all population type categories). The question of client/consumer board participation is complicated for these organizations: essentially any board member could be considered a client/consumer for an organization serving the general population. For these organizations, the most appropriate question is how reflective their board is of the community served. This issue is explored in detail in the "Client/Consumer Board Participation" section below.

*Primary Board Responsibility*

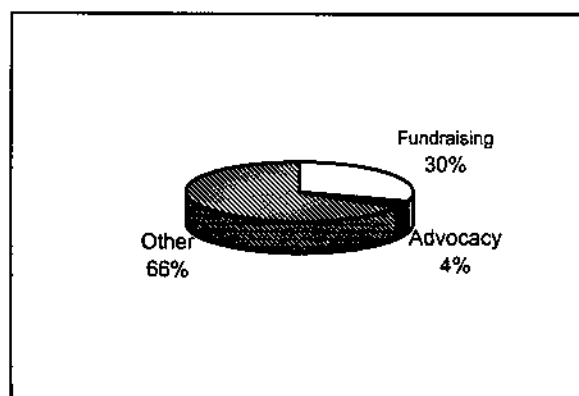
Respondents indicate the primary responsibility of their board, selecting from a list of options including "promote the organization generally," "raise funds," "establish policies and procedures," "advocate for policies, services and programs," and "provide general and/or fiscal oversight." Exhibit 3 shows that fundraising (30%) and providing oversight (28%) is the primary board responsibility for the greatest proportions of organizations.

**Exhibit 3**  
**Primary Responsibility of the Board**  
(n=1209)

<b>Board Responsibility</b>	<b>Number</b>	<b>Percent</b>
Raise funds	358	29.6%
Provide general and/or fiscal oversight	336	27.8%
Establish policies and procedures	237	19.6%
Promote the organization generally	228	18.9%
Advocate for policies, services, programs	50	4.1%
<b>Total:</b>	<b>1209</b>	<b>100.0%</b>

When differences in perceptions of and experiences with client/consumer board participation were considered, a clear and consistent pattern emerged. Organizations indicating the primary responsibility of their board is to raise funds or to advocate for policies, services, and programs stood out as having different perceptions and experiences, both from each other and from organizations with other primary board responsibilities. This analysis appears later in the report. Exhibit 4 displays the proportional groupings of boards according to the three categories of primary board responsibility: fundraising, advocacy, and other.

**Exhibit 4**  
**Grouped Primary Responsibility of the Board: Fundraising, Advocacy, and Other**  
 (n=1209)



*Board Recruitment Methods*

Organizations rely on varied and multiple methods for board member recruitment, as shown in Exhibit 5.

**Exhibit 5**  
**Methods of Recruiting New Board Members**  
 (n=1273)

Recruitment Method	Number	Percent*
Current/former board members	1164	91.4%
Staff	757	59.5%
Self-recommended or nominated	617	48.5%
Community leadership programs	451	35.4%
Current clients/consumers	446	35.0%
Local volunteer center/United Way	308	24.2%
Advertisements	142	11.2%
Board recruitment firms	35	2.7%

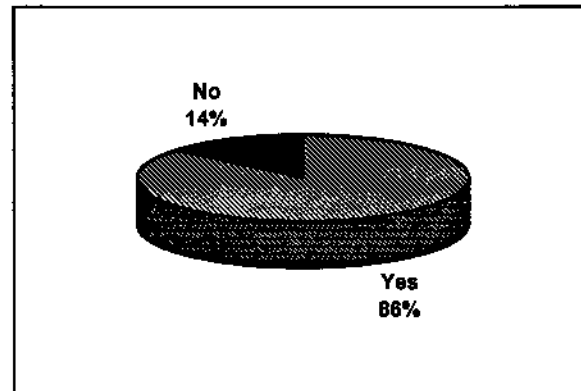
\* Please note: The total percentage is greater than 100% because respondents could indicate multiple recruitment methods.

The vast majority of organizations (91%) recruit new board members from current or former board members. Recommendations from staff (60%) and self-recommendations (49%) constitute the next most common recruitment methods. Over one-third (35%) of organizations recruit new board members from their current client/consumers.

*Formal Orientation/Training Program for New Board Members*

Most organizations provide a formal orientation or training program for new board members. As seen in Exhibit 6, 86% of surveyed organizations have a formal board orientation or training program for new board members.

**Exhibit 6**  
**Is There a Formal Orientation or Training Program for New Board Members?**  
(n=1258)

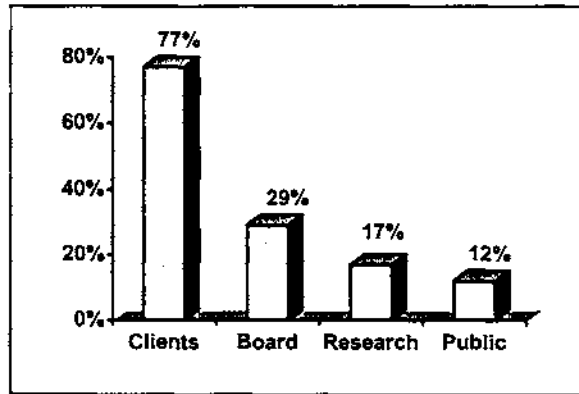


The proportion of these organizations providing an orientation or training program for new board members is higher than the proportion reported by the National Center for Nonprofit Boards (NCNB) in their 1997 *Snapshot of America's Nonprofit Boards*. According to the NCNB study, 67% of organizations "provided an orientation program for new board members in the last year."

*Methods of Obtaining Information on Client/Consumers*

In addition to client/consumer board participation, there are other ways of incorporating and reflecting the perceptions, opinions and experiences of client/consumers in organizational governance. Exhibit 7 displays the various ways in which organizations obtain information about the needs of clients and consumers of services (note that the total percentage is greater than 100% because respondents could indicate multiple methods).

**Exhibit 7**  
**Methods of Obtaining Information on the Opinions, Perceptions, and Needs of Client/Consumers**  
 (n=1273)

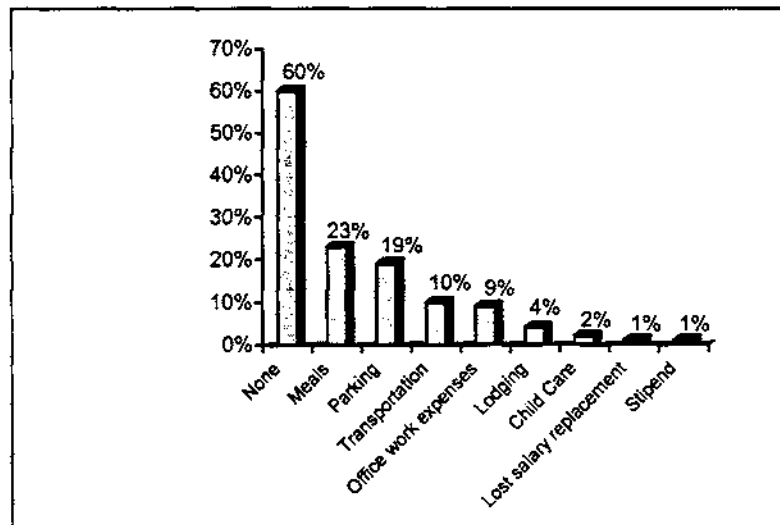


Over three-fourths (77%) of surveyed organizations obtain information on clients from clients themselves through surveys, interviews, and/or focus groups. Under one-third (29%) ask their board members about client needs and under one-fifth (17%) refer to secondary research and literature. Please note that "Public" refers to public hearings and community meetings as methods of obtaining information on the opinions, perceptions, and needs of client/consumers.

*Reimbursement for Board Service*

Forms of assistance or reimbursement for board service are not routinely provided by surveyed organizations. Exhibit 8 indicates that the majority of surveyed organizations (60%) do not provide any form of reimbursement or assistance for board service.

**Exhibit 8**  
**Types of Assistance/Reimbursement Available to Board Members**  
 (n=1273)



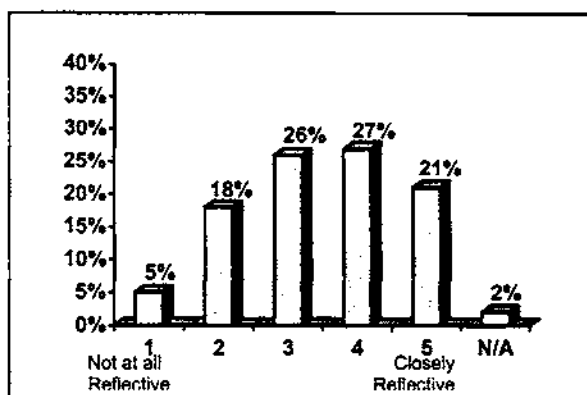
Please note: The total percentage is greater than 100% because respondents could indicate multiple recruitment methods.

Of the types of assistance/reimbursement provided, meals are most common: about one-quarter (23%) provide meals at board meetings. Reimbursement for parking (19%) and transportation (10%) follow in frequency. Organizations could facilitate board service, particularly for some specific client/consumer groups, by implementing policies of providing assistance or reimbursement for board service.

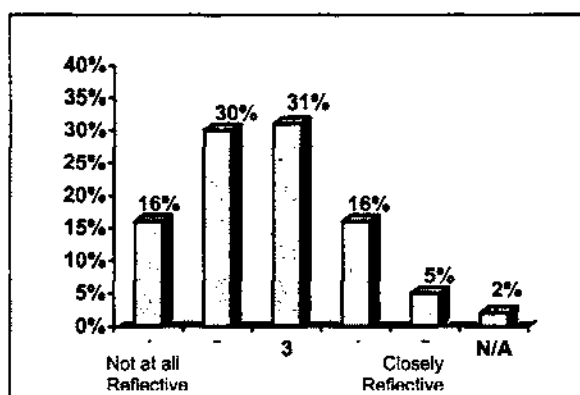
*Board Reflection of Client Demographics*

One indication of whether client perspectives are represented in board-level discussions is the degree to which the board reflects its client/consumer populations demographically. Assessing board reflection of client demographics touches upon the issue of board diversity and is directly related to client/consumer board participation. Exhibits 9–11 below show how closely reflective—on a five-point scale from “not at all reflective” (one point) to “closely reflective” (five points)—boards are of their clients in terms of race/ethnicity (Exhibit 9), socio-economic status (Exhibit 10), gender (Exhibit 11), and geography (Exhibit 12).

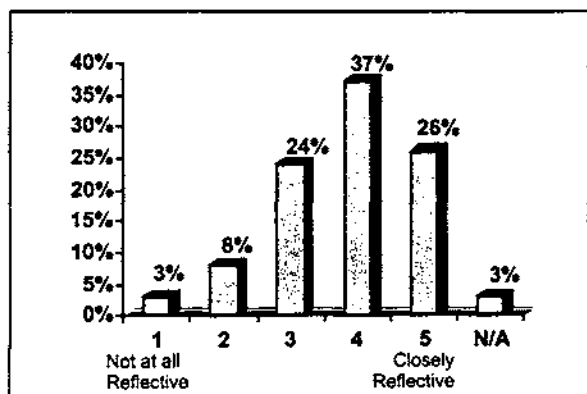
**Exhibit 9**  
**How Closely Does Your Board Reflect Your Clients' Race and Ethnicity?**  
 (n=1252)



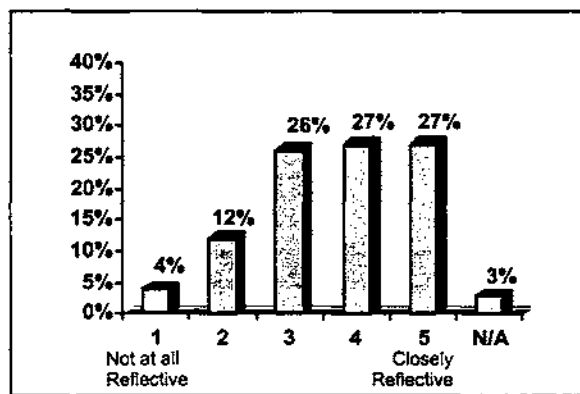
**Exhibit 10**  
**How Closely Does Your Board Reflect Your Clients' Socio-economic Status?**  
 (n=1250)



**Exhibit 11**  
**How Closely Does Your Board Reflect Your Clients' Gender?**  
 (n=1255)



**Exhibit 12**  
**How Closely Does Your Board Reflect Your Clients' Geography?**  
 (n=1255)



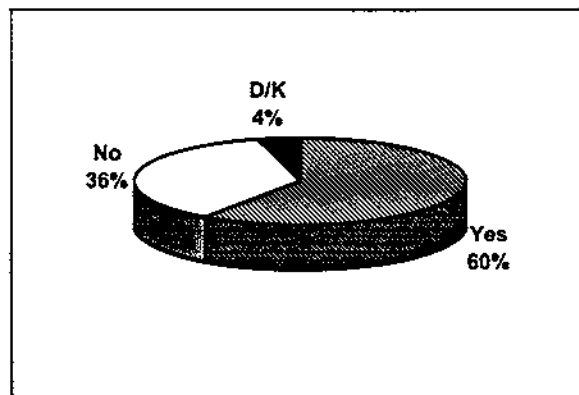
Boards are least reflective of their clients in terms of socio-economic status and most reflective in terms of gender. Almost half (46%) of organizations rank their board a "1" (16%) or "2" (30%) on the "not at all reflective" end of the scale for reflecting their clients in terms of socio-economic status. Nearly two-thirds (63%) of organizations rank their board as a "4" (37%) or "5" (26%) on the "closely reflective" end of the scale for reflecting their clients in terms of gender. Responses follow a bell-shaped curve for board reflection of clients in terms of race/ethnicity: most organizations fall in the middle, with responses tapering off at either end of the scale. Regarding geography—the extent to which board members represent the different neighborhoods where services are offered—organizations rank their boards as moderately reflective; about half rank their boards as either a "4" (27%) or a "5" (27%).

## ORGANIZATIONAL CLIMATE REGARDING CLIENT/CONSUMER BOARD PARTICIPATION

### *Formal Discussion About Client/Consumer Board Participation*

A majority (60%) of surveyed organizations report their board or one of its committees has indeed engaged in a formal discussion about client/consumer board participation, as portrayed in Exhibit 13.

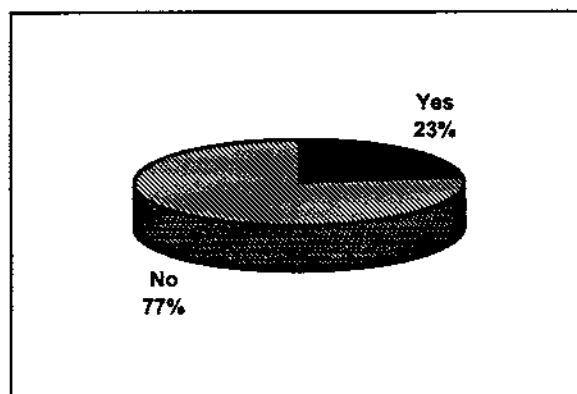
**Exhibit 13**  
**Has the Board or Any Committee Engaged in a Formal Discussion About Client/Consumer Board Participation?**  
(n=1245)



### *Written Policy on Client/Consumer Board Participation*

Formal discussions about client/consumer board participation can result in the development of a written policy on the subject. About one-quarter (23%) of the surveyed organizations developed a written policy, as seen in Exhibit 14.

**Exhibit 14**  
**Written Policy on Client/Consumer Board Participation**  
(n=1233)



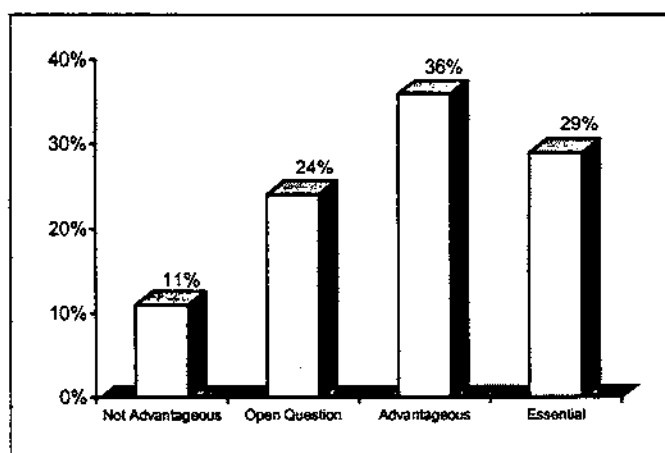
### *Organizational Opinion of Client/Consumers on Board*

In order to gauge attitudes toward client/consumer board participation, respondents were asked to select one of the following statements according to how closely it reflects their organization's perception:

- "Client/consumer board membership is not considered advantageous"
- "Advantage of or need for client/consumers on the board is an open question"
- "Client/consumer board membership might be advantageous but is not essential"
- "Client/ consumer board membership is essential"

Exhibit 15 shows that while responses approach a normal bell-curve distribution, they are slightly skewed towards the positive end of the scale (i.e., towards "advantageous" and "essential").

**Exhibit 15**  
**Organizational Opinion of Clients on Board**  
(n=1100)



Over one-third (36%) of respondents are of the opinion that client/consumer board participation might be advantageous but not essential. Under one-third (29%) are of the opinion that client/consumer board membership is essential. Together, these responses indicate that a majority of community-based organizations have a positive opinion of client/consumer board participation.

*"Who better to inform service provision than a consumer? Consumer representation on boards is essential."*

—Survey Respondent

*Specific Attitudes Towards Client/Consumer Board Participation*

The survey included a series of eleven statements to assess perceptions of attitudes related to client/consumer participation. Surveyed organizations indicate attitudes by reporting their agreement—on a five-point scale where “1” equals “strongly disagree” and “5” equals “strongly agree”—with these statements. Exhibit 16 provides a rank ordering of responses to each attitude statement in terms of the extent to which they indicate issues which are of little or some concern to organizations considering client/consumer participation.

**Exhibit 16  
Rank Ordering of Attitudinal Issues Regarding Client/Consumer Participation that Are of Little and Some Concern to Organizations**

	<b>Attitudinal Issue</b> (Actual Attitude Statement from Survey)	<b>n*</b>	<b>Mean Rating</b> Transformed <sup>1</sup>
<b>Issues of Little Concern</b>	<b>Board Meeting Location</b> (Our Board meets in places that would make service impractical for clients/consumers.)	1199	4.2
	<b>Client/Consumers' Impact on Fundraising</b> (Clients/consumer board members would hamper our fundraising efforts.)	1194	4.2
	<b>Attitudes of Other Board Members/Staff</b> (Other board or staff members would consider client/ consumer board membership inappropriate.)	1194	3.9
	<b>Legal and Liability Issues</b> (There are complex legal and liability issues in having our clients serve that we don't have the resources to address.)	1124	3.8
	<b>Board Meeting Times</b> (Our board meets at times that makes service impractical for client/ consumers.)	1195	3.8
	<b>Influence on Organizational Effectiveness</b> (Client/consumer involvement is essential to the effectiveness of my organization.)	1245	3.8
	<b>Perception of Client/Consumer Participation as a Concept</b> (Client/consumer participation on the board is a good idea.)	1242	3.8
	<b>Acceptance by General Board Members</b> (Client/consumer board members would be/are accepted readily by other board members.)	1205	3.8
<b>Issues of Some Concern</b>	<b>Board's Financial Connections</b> (Client/consumers would/do take the places on the board that are needed for people with the contacts and means to financially support the organization.)	1202	3.6
	<b>Client/Consumer's Resources for Board Participation</b> (Our clients could not afford the time or money to serve on the board.)	1176	3.5
	<b>Client/Consumer's Skills for Board Participation</b> (Our clients are not prepared or skilled to deal with the complex materials and issues of the organization.)	1211	3.4

\* The “n” (number of respondents) varies across statements because the number of respondents choosing the “Not Applicable” response category differs for each statement.

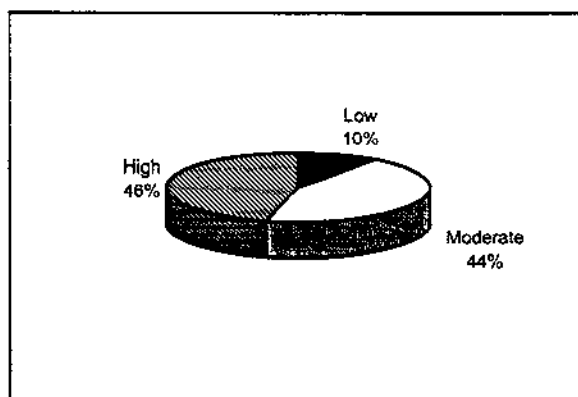
On the whole, organizations have positive attitudes towards client/consumer board participation, as indicated by the narrow range of mean scores on the five-point scale, with the highest score being a 4.2 and the lowest a 3.4. Organizations most strongly agree that meeting location is not a barrier to client/consumer participation and that client/consumer board members would not or do not stand in the way of the organization's fundraising efforts. On the

<sup>1</sup> Mean ratings for attitude statements expressing a negative sentiment with respect to client/consumer participation were calculated by transforming the agreement scale (e.g., a score of “1” becomes a “5”) to allow for cross-statement comparison.

other end of the scale, it is clear that organizations have concerns for the client/consumer: that they could not afford the time or money to serve and that they may not be prepared or skilled to deal with the issues addressed by the board. Responses also reflect anxiety about the impact of client/consumer board members on the organization itself: that client/consumers might take the places on the board that are needed for others with financial contacts and means.

Community-based organizations were given a summary score as an indication of their overall attitude towards client/consumer board participation. The score was assigned by multiplying the sum of their responses on the five-point agreement scale by eleven (the total number of statements). The summary score was grouped into one of three categories: "low" (16-32 points), "moderate" (33-43 points), and "high" (44-55 points). The higher the score, the more positive the attitudes. Exhibit 17 displays the proportion of organizations in each attitudinal grouping.

**Exhibit 17**  
**Summary Score for Attitudes Towards Client/Consumer Board Participation**  
(n=1007)

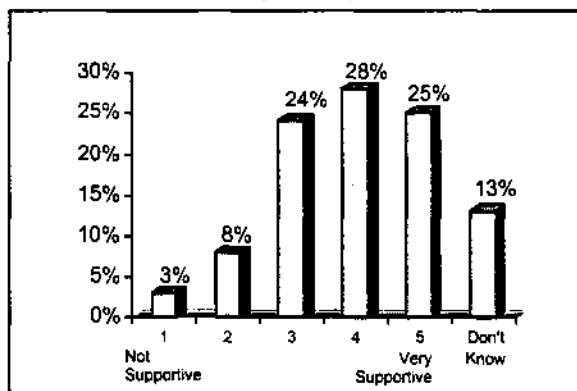


Most organizations fall into either the "high" (46%) or "moderate" (44%) category. A small proportion (10%) have the lowest level of attitudes towards client/consumer board participation. These groupings are used in subsequent analyses to elucidate differences in attitudes by organizational characteristics and experiences.

#### *Commitment to Client/Consumer Board Participation*

Respondents rank the culture of their organization's board in terms of its commitment to client/consumer representation and involvement on the board. The ranking employed a five-point scale from "not supportive" (a score of one point) to "very supportive" (a score of five points). Exhibit 18 below depicts levels of board commitment to client/consumer participation.

**Exhibit 18**  
**Board Commitment to Client Involvement on Board**  
(n=1254)



Organizations most frequently express moderate to high levels of commitment to client/consumer board participation. About one-quarter (24%) rank their board culture as a “3” on the five-point scale of support while over half rank their board culture as either a “4” (28%) or a “5” (25%), indicating very supportive environments. In the “Client/Consumer Board Participation” section, whether these high levels of commitment to client/consumer board involvement translate into practice will be seen.

**DIFFERENCES IN CLIMATE REGARDING CLIENT/CONSUMER BOARD PARTICIPATION BY ORGANIZATIONAL TRAITS**

Aspects of organizational climate regarding client/consumer participation differ according to specific traits or areas of focus for an organization. Differences in climate regarding client/consumer participation were considered by written policy status, organization type, populations served, and primary board responsibility.

*Written Policy Status*

Organizations that have a written policy regarding client/consumer board involvement have formalized their position on the issue. The organization considering the issue of client/consumer board involvement might be curious to know what the process was by which an organization came to adopt a policy. Is having a formal discussion a step in the process leading to a written policy? And, is having a written policy in fact related to a more conducive organizational climate regarding client/consumer board participation?

While the survey data cannot reconstruct the full process by which organizations developed their written policies, it is possible to explore the relationships between having a written policy and other factors. First, organizations with a written policy (80%) are much more likely than those that do not have such a policy (53%) to have had a formal discussion about client/consumer board involvement ( $\chi^2$ ,  $p < 0.001$ ); which came first in time is unknown, but it is logical to assume the discussion preceded, or at least happened during, the policy development process.

**Worthy of Note**

**Organizations with a written policy are more likely to have had a formal discussion about, and to have more positive attitudes towards, client/consumer board participation.**

Also, organizations with a written policy do have an overall more positive attitude towards client/consumer participation compared with organizations without such a policy (means=45.0 and 41.6, respectively; ANOVA,  $p<0.001$ ).

### *Organization Type*

Organizations that engage in activities beyond direct service, including advocacy, education, and membership, generally have climates that are conducive to client/consumer participation. Compared with direct service organizations only, these organizations are significantly more likely to have engaged in formal discussion (54% compared with 65%, respectively;  $\chi^2$ ,  $p<0.001$ ) and to have a written policy (17% compared with 30%, respectively;  $\chi^2$ ,  $p<0.001$ ) regarding client/consumer board participation.

<p style="text-align: center;"><b>Worthy of Note</b></p> <p>Through discussion, policy, and positive attitudes, organizations with advocacy, education, and membership functions foster a more conducive climate for client/consumer board participation.</p>
---

Organizations with advocacy, education, and membership functions compared with those providing direct services only also have a significantly higher opinion of and more positive attitudes towards client/consumer board participation. On the four-point opinion scale (from “not advantageous” to “essential”), the “beyond service-providing” organizations have a higher opinion of client/consumer participation as compared with “service-providing only” organizations (means=2.9 and 2.7, respectively; ANOVA,  $p=0.001$ ). Similarly, organizations with advocacy, education, and membership functions have significantly higher overall attitudes towards client/consumer board participation as compared with organizations that do not have these additional functions (means=43.1 and 41.7, respectively; ANOVA,  $p=0.002$ ).

### *Populations Served*

When organizations are grouped based on target population served and compared with all other organizations, important differences emerge in organizational climate regarding client/consumer board participation. In order to create mutually exclusive groupings for meaningful analysis, organizations were clustered based on target population served as expressed in their mission statements. The following provides a summary of differences in organizational climate based on population served.

- Organizations serving **Children and Youth**, compared with all other organizations, are significantly *more likely* to have a written policy on client/consumer board participation (29% compared with 17%, respectively;  $\chi^2$ ,  $p<0.001$ ).
- Organizations serving **Families**, compared with all other organizations, are *more likely* to have had a formal discussion regarding client/consumer board involvement (63% compared with 55%, respectively;  $\chi^2$ ,  $p=0.039$ ) yet *less likely* to have a written client/consumer board participation policy (20% compared with 27%, respectively;  $\chi^2$ ,  $p=0.007$ ).
- Organizations serving **Disaster Victims**, compared with all other organizations, are significantly *less likely* to have a written policy regarding client/consumer board participation (15% compared with 25%, respectively;  $\chi^2$ ,  $p=0.002$ ).

- Organizations serving **Low-Income communities**, compared with all other organizations, are significantly *more likely* to have had a formal discussion about client/consumer board involvement (62% compared with 57%, respectively;  $\chi^2$ ,  $p=0.070$ ) yet are *equally as likely* to have a written policy.

There are no significant differences in organizational climate regarding client/consumer board participation for organizations serving racial/ethnic minorities and people with disabilities when compared with other organizations.

### *Primary Board Responsibility*

As mentioned earlier, two of the specified primary board responsibilities—fundraising and advocacy—stand out from all others as indicators of difference in perception and experience. In essence, organizations which view advocacy as the board’s primary responsibility have more conducive environments for client/consumer participation, in terms of having discussed the issue and having a high opinion of and positive attitudes towards client/consumer participation.

**Worthy of Note**  
**Boards with advocacy as their primary responsibility have the most conducive climates for client/consumer board participation.**

“Advocacy” boards (72%) compared with “fundraising” (59%) and “other” (58%) boards are more likely to have had a formal discussion about client/consumer participation ( $\chi^2$ ,  $p=0.062$ ). Likewise, advocacy boards’ opinion of client/consumer participation (mean=3.0) is higher than their counterparts with fundraising (2.7) and other areas (2.8) of primary responsibility (ANOVA,  $p=0.059$ ) and they have more positive attitudes overall towards client/consumer participation (means=44.9, 40.8, and 42.9, respectively;  $p<0.001$ ).

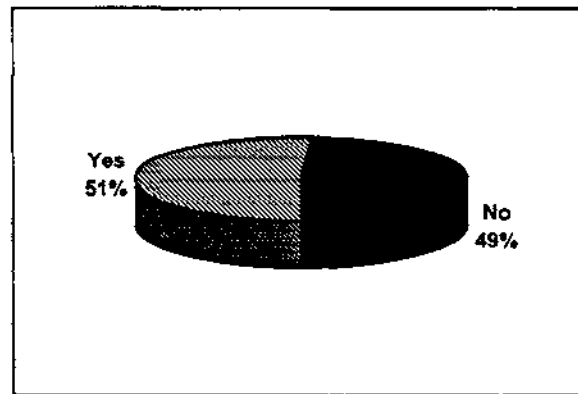
## CLIENT/CONSUMER BOARD PARTICIPATION

### *Overall Prevalence*

When asked, "Does your organization have client/consumers participating on your board?" 51% of organizations say "Yes" (see Exhibit 19). This is substantially higher than that which has been reported by other organizations in the past. Though not a precisely parallel statistic, in its 1997 *Snapshot of America's Nonprofit Boards*, the National Center for Nonprofit Boards reported that 23% of board members were "chosen to serve because of their status as clients or constituents."

**Worthy of Note**  
51% of organizations report to have client / consumers on board.

**Exhibit 19**  
**Does your Organization Have Client/Consumers Participating on the Board?**  
(n=1235)



Further analysis, described below, will show that organizations with actual experience having client/consumer board participants are more likely to have positive attitudes towards, and feel most strongly about the benefits of, client/consumer involvement. This analysis focuses on the 610 organizations reporting to have client/consumer board members.

*"We involve clients (youth), which has been very effective and resulted in more youth-friendly programming."*

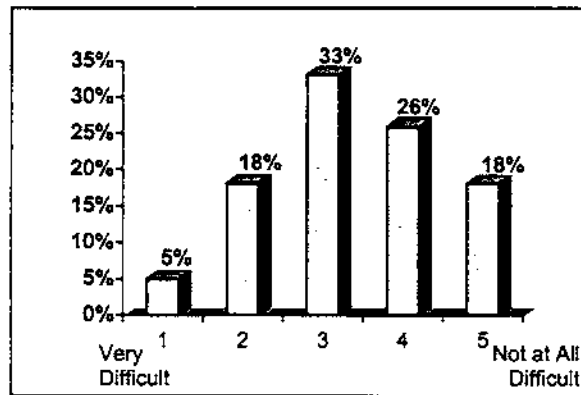
—Survey Respondent

### *Recruiting Client/Consumer Board Participants*

Organizations with client/consumer board members were asked how difficult it is for them to recruit client/consumer board participants. Degree of difficulty in recruiting client/consumers to the board was reported on a five-point scale, with "1" meaning "very difficult" and "5" meaning "not at all difficult." Exhibit 20 shows a normal distribution of responses: the highest proportion (33%) has a mid-level degree of difficulty (a score of "3" on the scale) with decreasing proportions having both extremely high (5%) and extremely low (18%) degrees of difficulty.

**Worthy of Note**  
Most organizations with client/consumers on board say it is not difficult to recruit and retain these participants.

**Exhibit 20**  
**Difficulty Recruiting Client/Consumers to the Board**  
 (n=610)

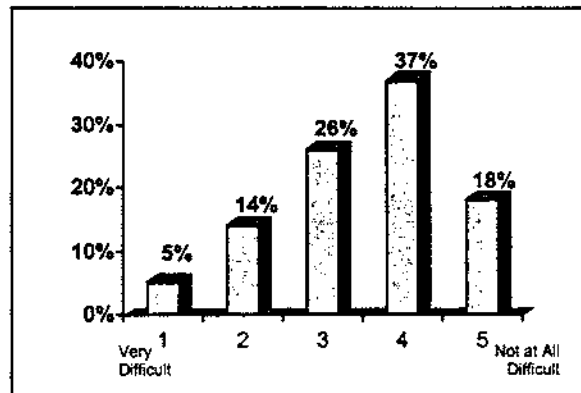


It speaks well for the future of client/consumer board involvement that the lowest proportion (5%) say recruiting client/consumer board members is “very difficult.” Clearly, the vast majority of organizations are finding ways to recruit client/consumer board members, a positive message for any organization that has deferred client/consumer involvement based on fears that recruitment might pose a formidable barrier.

*Retaining Client/Consumer Board Participants*

Is it difficult for organizations to keep client/consumers on board after they are recruited? For most organizations, the answer is “No.” Exhibit 21 depicts that less than 20% find it either “difficult” (14%) or “very difficult” (5%) to retain client/consumer board participants.

**Exhibit 21**  
**Difficulty Retaining Client/Consumers on the Board**  
 (n=602)



## DIFFERENCES IN PREVALENCE OF CLIENT/CONSUMER BOARD PARTICIPATION BY ORGANIZATIONAL TRAITS

This section examines differences in overall prevalence of client/consumer board participation by the following traits:

- Organization type (i.e., service providing only and beyond service providing);
- Populations served;
- Primary board responsibility;
- Formal discussion and written policy status; and,
- Other indicators of organizational climate regarding client/consumer participation (i.e., opinion, attitudes, and commitment).

In addition this section examines whether there is a relationship between having client/consumers on the board of a national organization and having client/consumers on the board of the community-based affiliate. For these analyses, each factor is assessed for organizations *with* client/consumer board members and compared to organizations *without* client/consumer board members.

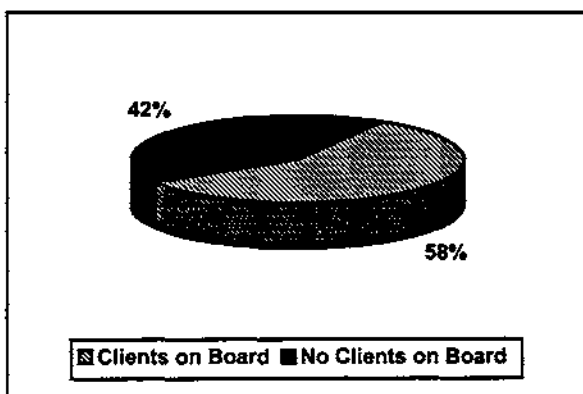
### *Organization Type*

Organizations with advocacy, education, and/or membership functions in addition to direct service provision, are significantly more likely to have client/consumer board members. As seen in Exhibit 22, 58% of “beyond service-providing” organizations have client/consumer board members compared with 42% of service-providing only organizations ( $\chi^2$ ,  $p < 0.001$ ).

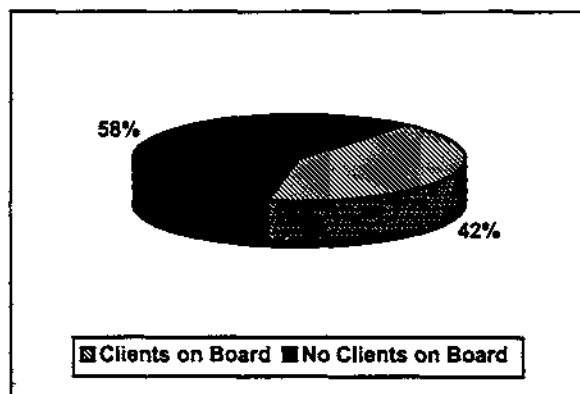
**Worthy of Note**  
Organizations with advocacy and education functions are more likely to have client/consumers on board.

**Exhibit 22**  
**Organization Type and Client/Consumer Participation**  
 $p < 0.001$

“Beyond” Service-Providing (Advocacy, Education, and Membership) Organizations  
(n = 620)



Service-Providing Only Organizations  
(n = 608)

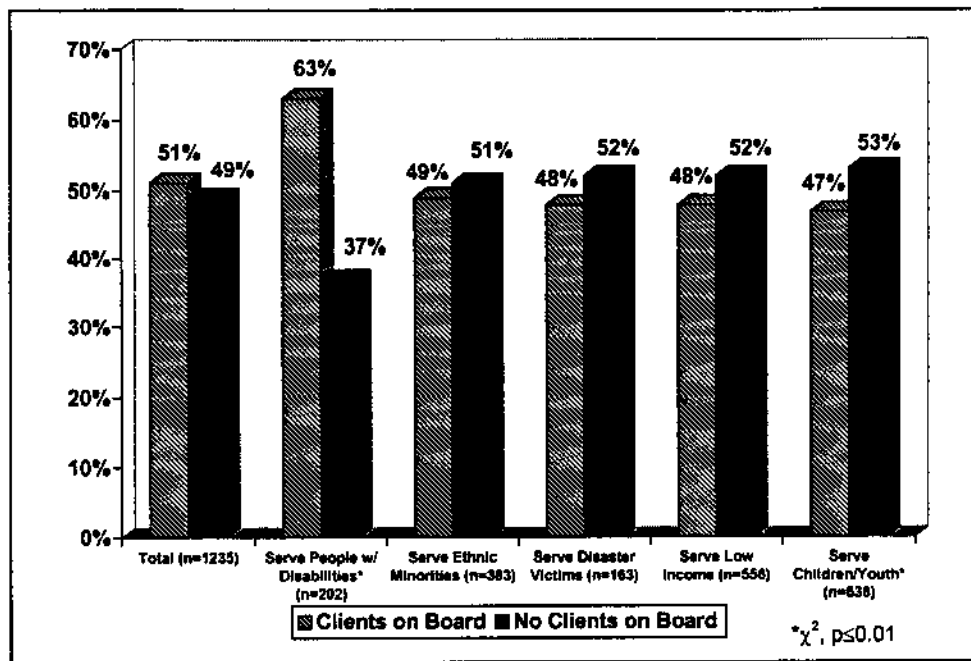


A higher prevalence of client/consumer participation among organizations with advocacy and education roles makes sense. Who better to inform an advocacy and education component than members of the population which stands to benefit from resulting policies and practices?

*Populations Served*

Does client/consumer board involvement vary according to the population served by an organization? For organizations serving children and youth as well as those serving people with disabilities, the answer is "Yes." Exhibit 23 portrays the proportion of organizations serving various populations that have client/consumers on board, with reference to the total sample for comparison.

**Exhibit 23  
Populations Served and Client/Consumer Participation**



Organizations that serve people with disabilities are significantly more likely to have client/consumer board participants than not (about two-thirds of these organizations have client/consumers on board) *and* are more likely to have client/consumer board participants compared to other types of organizations ( $\chi^2$ ,  $p < 0.001$ ).

Organizations that serve children and youth are significantly less likely than other organizations to have client/consumer board members: 47% of children/youth-serving organizations have client/consumers on board compared with 54% of all other organizations (not depicted here;  $\chi^2$ ,  $p = 0.012$ ) and 51% for the overall sample.

This may seem surprising given that youth-serving organizations have been pioneers in the movement to involve client/consumers in organizational governance. In analyzing the written comments made on the surveys, three explanations emerge for this finding:

- 1) Many of the surveyed organizations serve *children* under the age of 12 only, not youth, and board service for children is less practical than for youth or young adults;
- 2) Many youth-serving organizations (i.e., those serving adolescents and young adults) involve young people in organizational governance in ways other than board service, such as on advisory groups; and,
- 3) Some organizations are challenged by state laws that limit youth participation on boards of directors.

*Board Primary Responsibility*

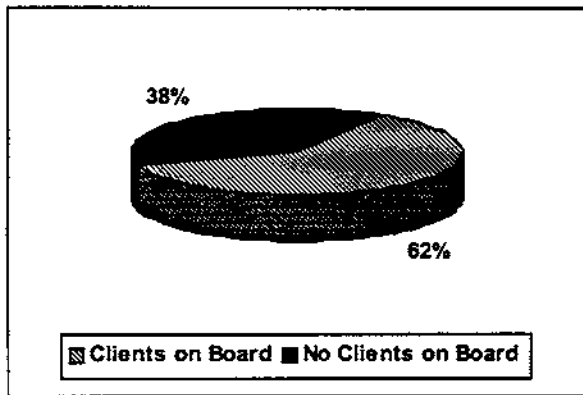
Boards with advocacy as a primary responsibility are significantly more likely than boards with fundraising as a primary responsibility to have client/consumer representatives (62% compared with 43%;  $\chi^2$ ,  $p=0.002$ ), as Exhibit 24 shows.

**Worthy of Note**

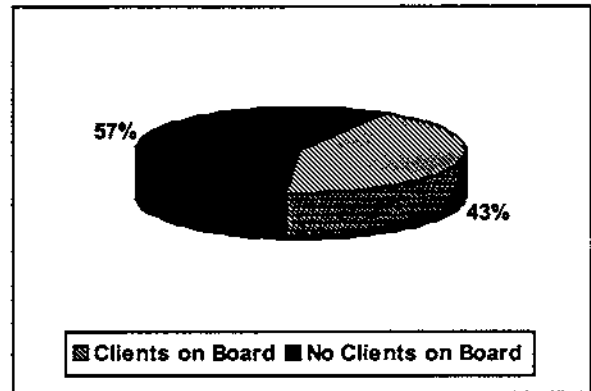
Client/consumers appear to be viewed as effective advocates, but not as effective fundraisers.

**Exhibit 24**  
**Primary Board Responsibility and Client/Consumer Participation**  
 $p=0.002$

Boards with Advocacy  
as Their Primary Responsibility  
(n = 45)



Boards with Fundraising  
as Their Primary Responsibility  
(n = 354)



These findings suggest that client/consumers are seen as effective advocates, but not necessarily as effective fundraisers.

*Formal Discussion and Written Policy Status*

Organizations that have had a formal discussion (Exhibit 25) and have a written policy (Exhibit 26) on the issue of client/consumer board participation are more likely to have client/consumer board representatives.

**Worthy of Note**

Formal discussions and a written policy are important aspects of realizing client/consumer board inclusion.

**Exhibit 25**  
**Formal Discussions Regarding Client/Consumer Board Participation and Actual Client/Consumer Board Participation**

p<0.001

Organizations that have had a Formal Discussion on Client/Consumer Participation  
 (n = 719)

Organizations that have *not* had a Formal Discussion on Client/Consumer Participation  
 (n = 443)

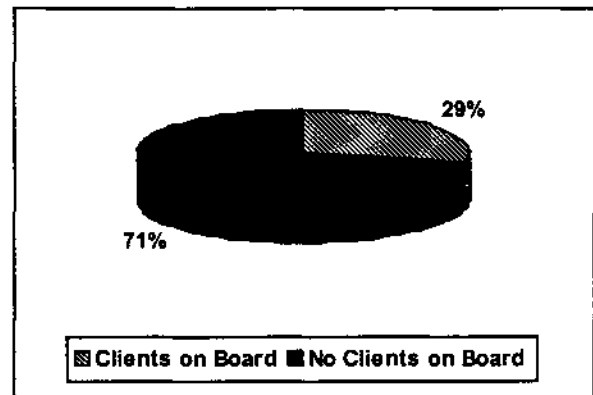
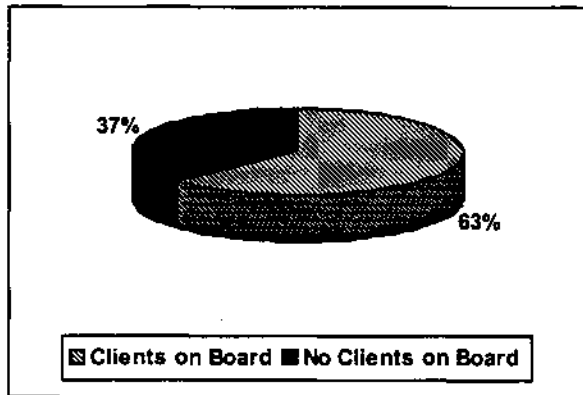


Exhibit 25 shows that organizations that have had a formal discussion on client/consumer board participation are more than twice as likely as organizations that have not had a similar discussion to actually have client/consumer board representatives (63% compared with 29%, respectively;  $\chi^2$ , p<0.001).

**Exhibit 26**  
**Written Policy Regarding Client/Consumer Board Participation and Actual Client/Consumer Board Participation**

p<0.001

Organizations *With* a Written Policy on Client/Consumer Board Participation  
 (n = 275)

Organizations *Without* a Written Policy on Client/Consumer Board Participation  
 (n = 927)

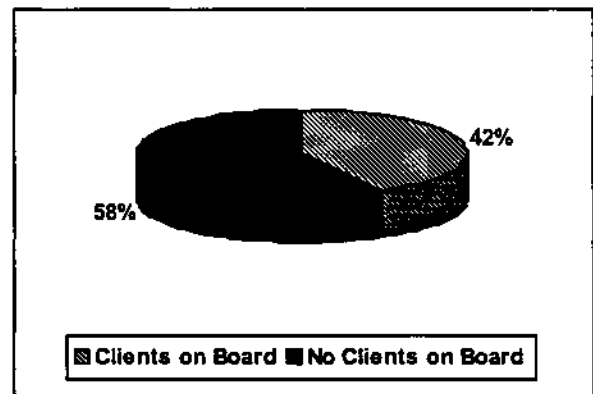
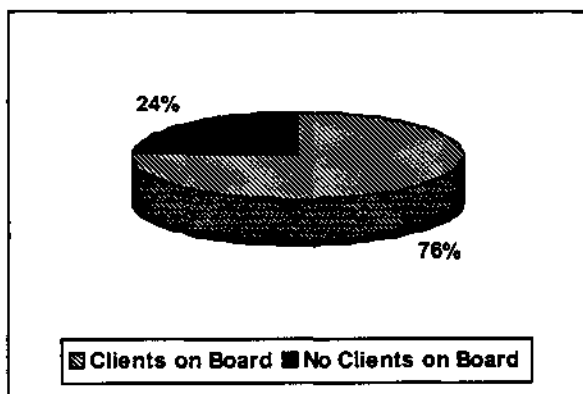


Exhibit 26 reveals that while about three-quarters (76%) of organizations with a written policy on the issue have client/consumer board members, the proportion of organizations with client/consumer representatives drops to 42% for those without a written policy ( $\chi^2$ , p<0.001).

*Other Indicators of Organizational Climate: Opinion, Attitudes, and Commitment*

On the whole, experience with client/consumer board members appears to have a powerful and positive influence on an organization's opinion of, attitude towards, and commitment to client/consumer board participation. For each of these measures of organizational climate regarding client/consumer involvement, organizations with client/consumer board members rank more positively than their counterparts without client/consumers on board. Exhibit 27 provides the mean scores for each measure (opinion, attitude, and commitment), comparing organizations with and without client/consumer board members.

**Worthy of Note**

Experience with client/consumer board members has a powerful and positive influence on an organization's opinion of, attitude towards, and commitment to client/consumer inclusion.

**Exhibit 27**  
**Comparison of Opinion of, Attitudes Towards, and Commitment to Client/Consumer Participation for Organizations With and Without Client/Consumer Board Participants**

Measure	Range of Scale	Mean Score for Organizations...		ANOVA p-value
		With Client/Consumer Board Members	Without Client/Consumer Board Members	
Scale of Organizational <i>Opinion</i> Regarding Client/Consumer Participation (n=1080)	1 to 4	3.3	2.2	<0.001
Summary Score for <i>Attitudes</i> Towards Client/Consumer Participation (n=984)	11 to 55	45.7	38.4	<0.001
Ranking of Board <i>Commitment</i> to Client/Consumer Participation (n=1060)	1 to 5	4.0	3.4	<0.001

In terms of organizational opinion, respondents from organizations with client/consumer board members score more than a full point higher on the four-point scale from "client/consumer board membership is not considered advantageous" to "client/ consumer board membership is essential" (ANOVA, p<0.001).

With respect to overall attitudes towards client/consumer board participation, organizations with client/consumer board members score seven points higher on the summary of attitudes scale as compared with organizations without client/consumer board members (ANOVA, p<0.001). Organizations with client/consumer board members perceive fewer barriers to their inclusion and place a higher value on their inclusion.

The same story applies for level of board commitment to client/consumer participation. Organizations with client/consumer board members have a significantly higher average level of commitment to client/consumer participation (mean=4.0) compared to organizations without client/consumer board members (3.4) (ANOVA, p<0.001).

*National Membership Organizations and Their Community-Based Affiliates: The Prevalence of Client/Consumer Board Participation*

The continuity and flow of this three-year project and corresponding set of research studies allows for unique types of analytic exploration. The survey of national organizations contained many similar questions as this survey of community-based affiliates, and the national organizations of all of the community-based affiliates represented here were surveyed. By linking the two data sets for the national and community-based affiliate surveys, it is possible to examine whether national-level policies and practices correspond with local affiliate policies and practices.

With respect to prevalence of client/consumer board representation, national and local practices are indeed significantly related. Nearly half (48%) of national organizations with client/consumer board members have community-based affiliates that also include client/consumers as board members.

**Worthy of Note**  
Community-based affiliate organizations are more likely to have client/consumers on board when the national board practices client/consumer inclusion.

Thirty-nine percent of the national organizations that do not have client/consumer board members have local affiliates that also report having no client/consumer board representatives ( $\chi^2$ ,  $p=0.034$ ). This suggests that national organizations are well positioned to advance a goal of client/consumer board participation by modeling that behavior at the national level.

## CLIENT/CONSUMER PARTICIPATION AND BOARD DIVERSITY: AN INTERSECTION OF ISSUES

### *Discussion*

The primary principle guiding this project hypothesizes that including client/consumers in organizational governance ultimately helps to align an agency's programs and services with the needs of those it serves. This principle has served well as a research premise and, accordingly, has driven the study's various information-gathering efforts.

At the same time, client/consumer inclusion on boards of directors often impacts an organization beyond the alignment of programs and services with target population needs. Traditionally, boards have been comprised primarily of white, middle- to senior-aged men, and increasingly, women.<sup>2</sup> Bringing client/consumers onto a board of directors often changes its profile, adding members from groups that have been historically under-represented in organizational governance. Herein lies the intersection of client/consumer participation and board diversity.

The survey of national organizations showed—as will the findings from the present study—that there is a relationship between client/consumer participation and board diversity. Organizations with ultimate-service-recipient client/consumers on board are statistically significantly more likely to be demographically diverse compared with organizations that do not

<sup>2</sup> According to the National Center for Nonprofit Boards' 1997 *Snapshot of America's Nonprofit Boards*, 85% of board members were white, 64% were aged 40 to 59 years old, and 46% were women.

have client/consumer board participants. While increasing board diversity may not have been an explicit goal for organizations that include client/consumers, the result remains: these boards are relatively more diverse than their counterparts.

What does the intersection of client/consumer participation and board diversity mean? For research projects, it highlights the need for specific focus and clear definitions. Many organizations surveyed in this study, for example, report to have client/consumers on their boards, yet when they indicate the characteristic(s) of client/consumer board participants, their traits do not match those of the populations served by the organization. This suggests that when answering the question “Does your organization have client/consumers participating on your board?” some respondents may have considered anyone from a traditionally under-represented group to “count” as a client/consumer. Other respondents (appropriately) included people involved in the client/consumer’s life—such as family members and caretakers—as “client/consumers” in their responses. The data analysis, presented in the “Narrowing the Focus” section of the report, considers how these definitional variances influence study findings.

For practitioners, the intersection of these issues suggests that including client/consumers on the board offers multiple opportunities to add value to organizational governance processes. Client/consumer board members not only bring the unique perspective of a service recipient to bear on programmatic issues specifically, but also contribute to the diversity of the board in general.

### *Survey Findings*

The notion is posited above that client/consumer inclusion on boards might increase board diversity. Do the data support the hypothesis? Yes, the findings indicate that organizations with client/consumer board participants more closely reflect the demographics of the community they serve in terms of ethnicity, socio-economic status, and geography than organizations that do not have client/consumer board representatives. This means, for example, that an organization serving youth that includes youth as board members has **other** demographic characteristics, such as race/ethnicity, that more closely reflect the community-at-large than organizations serving youth that do not have youth board members.

<p style="text-align: center;"><b>Worthy of Note</b></p> <p>Client/consumer inclusion increases board diversity. Organizations with client/consumers on board have boards that closely reflect the demographics of those they serve.</p>
--

On a five-point scale from “not at all reflective” (one point) to “closely reflective” (five points), organizations indicate how closely their board mirrors the community population in terms of race/ethnicity, socio-economic status, gender, and geography. With the exception of gender, organizations that have client/consumer board members score higher on average on the “reflective” scale than organizations that do not have client/consumer board representatives.

Regarding *race/ethnicity*, organizations with client/consumer board members have a mean score of 3.6 on the “reflective” scale, compared with a mean score of 3.2 for organizations that do not have client/consumers on board (ANOVA,  $p < 0.001$ ). The difference is even greater for *socio-economic status*: organizations with client/consumer board members have a mean score of 2.9, compared with 2.3 for organizations that do not have client/consumers on board (ANOVA,  $p < 0.001$ ). In terms of *geography*, organizations with client/consumer board members score a 3.8 on average, compared with 3.5 for organizations that do not have client/consumers on board (ANOVA,  $p < 0.001$ ). Clearly, client/consumer board participation contributes not only

to the alignment of programs and services with client needs but also helps to align the demographics of the board with the characteristics of the community.

## NARROWING THE FOCUS: SPECIAL TARGETED ANALYSES

This section contains findings from a set of targeted analyses designed to narrow the focus to very specific issues related to the prevalence of and attitudes towards client/consumer board participation. Additionally, successes in overcoming some barriers to client/consumer board participation are highlighted and issues unique to including youth as client/consumer board members are explored. Lastly, relationships between the experience with client/consumers at the national and community-based levels are considered.

### *Matching Client/Consumer Characteristics with Populations Served: Creating a Common Definition*

Issues of definition challenge all research projects, particularly those conducted on such a large scale as this study of over 1200 community-based organizations. The participating organizations serve diverse target populations, span the nation geographically, and vary in terms of mission, programs, and services. To maximize consistency in terms of reference and types of responses to survey questions, the following definition<sup>3</sup> of "client/consumer" was provided at the very beginning of the survey:

*For the purposes of this survey, "client/consumer" includes any person served by the programs and services that carry out this organization's mission and any person identified in this organization's mission as a client/consumer. You may refer to them as members, participants, customers, users, target population, residents, patients, students, parents, children, or another name. The generic term client/consumer is used to signify all of these people.*

This definition appropriately encourages a broad interpretation of "client/consumer," so that responding organizations could relate their experience and practice to the survey questions.

At the same time, a broad definition of "client/consumer" has the potential to temper, or in other ways confound, the survey findings. Some effects of using a broad definition are apparent from the written survey comments and quantitative analysis. For example, many organizations focusing on services for children include parents on their boards of directors and consider these participants to be their client/consumers, an appropriate designation if so stated in the organization's mission. Likewise, some organizations serving people with disabilities indicate they include family members on their boards and consider these individuals to be client/consumers. The survey honors these individual practices and definitions.

From the quantitative analysis, greater detail became apparent as the following illustrates: a children/youth-serving organization indicated having client/consumers on board, yet the reported characteristics of its client/consumer board members were "low-income" and "ethnic minority;" the adolescent and young adult categories were not checked. Several explanations are possible, but most likely the organization includes parents or others directly involved in young people's lives.

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<sup>3</sup> This definition is also included in the Methods section at the front of this report and is repeated here for the reader's convenience.

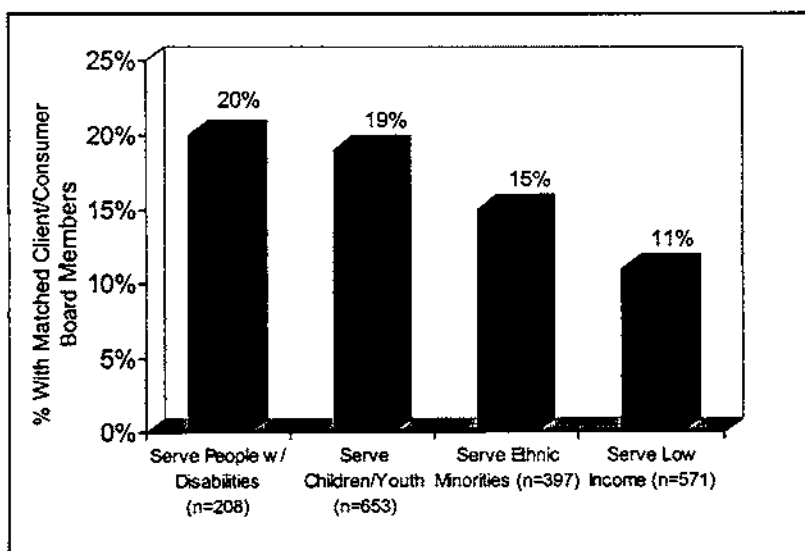
At the same time, it is important to note that this broad definition of client/consumers could potentially serve to dilute the issues and challenges faced by an organization that aims to include only the actual service recipients rather than their surrogates or ancillary supporters. What follows is an analysis that aims to focus specifically on those organizations that not only define themselves as having client/consumer board members but that have board members who are actual recipients of agency programs and services.

The following analysis narrows the focus to examine organizations that serve low-income, people with disabilities, youth, and ethnic minority communities *and* have client/consumer representatives explicitly from the group served. Organizations serving families and the general population are excluded from this analysis.

*Prevalence of Client/Consumer Board Participants Matching Target Population Characteristics*

One-fifth of organizations serving people with disabilities (20%) and youth (19%) have people with disabilities and youth client/consumer board members, respectively. Of organizations serving ethnic minorities and low-income populations, 15% and 11%, respectively have client/consumers with these same characteristics. Exhibit 28 shows these proportions of organizations with client/consumer board members whose characteristics match those of the organization's target population.

**Exhibit 28**  
**Populations Served and Matched Client/Consumer Participation**



The proportions of organizations with client/consumer board participants matching target population characteristics is, as a function of this more restrictive analysis, lower than the overall proportion of organizations reporting to have any client/consumers on board.

Exhibit 29 reveals the demographic characteristics of client/consumer board participants for each type of organization—youth-serving, people with disabilities-serving, ethnic minority-serving, and low income-serving—examined here. The table cells with bold outline contain the proportion of organizations with client/consumer board participants who match the type of

population served. Please note that the demographic characteristics listed are not mutually exclusive and that the list is not exhaustive.

**Exhibit 29**  
**Comparison of Organizations Serving Specific Target Populations and Demographic Characteristics of Client/Consumer Board Members**

		Type of Organization, Based on Population Served				
		All Orgs (n=1273)	People with Disabilities- Serving (n=208)	Youth- Serving (n=653)	Ethnic- Minority- Serving (n=397)	Low- Income- Serving (n=571)
Demographics of Client/Consumer Board Members	Any Client/Consumer	50.5%*	62.9%	47.3%	50.9%	48.2%
	People with Disabilities	5.3%	19.7%	2.5%	8.1%	7.2%
	Youth (under 24 yrs old)	12.4%	11.1%	18.7%	9.8%	7.9%
	Ethnic minorities	11.4%	15.9%	9.2%	15.1%	13.7%
	Low income	7.5%	16.3%	5.1%	11.8%	11.0%

\*n=1235

Is there a difference in organizational climate regarding client/consumer board participation based on whether an organization has characteristically "matched" client/consumer board members compared with surrogates and supporters of actual client/consumers on board? While it is suggested above that a broad definition of "client/consumer" might "temper or in other ways confound" the findings, this hypothesis is not supported by the survey findings. Organizations with matched client/consumer board members as well as organizations that describe themselves as having client/consumer participants but appear to have surrogates of client/consumers both tend to have organizational climates that are highly supportive of client/consumer board participation. This suggests that where there is an appreciation of the value of the client/consumer perspective, there is also an environment that is supportive of their participation.

**Worthy of Note**

Organizational climate is highly supportive of client/consumer board participation among organizations with "matched" client/consumer board members as well as those with surrogates and supporters of service-recipient client/consumers on board.

For a few indicators of organizational climate, however, organizations with surrogate client/consumers do not rank as extremely high as those with matched client/consumer participants. Exhibit 30 shows that organizations with matched client/consumers:

- rank their commitment to client/consumer participation slightly higher than those with client/consumer surrogate/supporters;
- more strongly believe that client/consumer involvement is essential to the organization's effectiveness as compared with those that have client/consumer surrogate/supporters; and
- more strongly resist the notion that client/consumers take board seats that are needed for others with financial contacts and means.

It is equally important to recall that, as discussed earlier and as shown in Exhibit 27, organizations with client/consumer participants have organizational climates that are much more supportive than organizations with no client/consumer representatives across all indicators and measures. This analysis further clarifies that organizational climate is similarly supportive regardless of whether the client/consumer participant is a direct service recipient or a surrogate/supporter.

**Exhibit 30**  
**Differences in Organizational Climate Between Organizations with Matched Client/Consumer Participants and Client Surrogate/Supporter Participants**

Measure of Organizational Climate	Mean Score on Five-Point Scale for Organizations...		ANOVA p-value
	With Matched Client/Consumer Board Members	With Surrogate Client/Consumer Board Members	
Scale of Organizational Opinion Regarding Client/Consumer Participation (n=493)	4.2	4.0	0.007
Attitude Rating: Client/Consumer involvement is essential to the organization's effectiveness (n=517)	4.3	4.1	0.009
Attitude Rating: Client/consumers would NOT take board seats needed for others with financial contacts and means (n=507)	4.2	3.9	0.007

*Serving the General Population: What are the Benefits of Client/Consumer Inclusion?*

For organizations serving the general population, the degree to which the board's composition reflects its target community is the best measure of value added by client/consumer inclusion. Do general-population-serving organizations with client/consumer board members have boards that closely reflect the community and clients they serve?

Compared with all other organizations (mean=3.5), those that serve the general population but *do not* have client/consumer board members have boards that are *less* reflective of the community and clients served (3.3) in terms of race/ethnicity (ANOVA, p=0.068). They are equally as reflective as other organizations in terms of socio-economic status, gender, and geography.

Compared with general-population-serving organizations that do not have client/consumers on board, those that *do* have client/consumer board members are significantly more reflective of the community served in terms of race/ethnicity (means=3.2 and 3.4, respectively; ANOVA, p=0.055), socio-economic status (means=2.4 and 2.9, respectively; ANOVA, p<0.001), and geography (means=3.4 and 3.8, respectively; ANOVA, p<0.001). Once again, client/consumer representation adds value to the board process.

*Youth Participation: The Value in Confronting Perceived Challenges\**

Organizations considering youth client/consumer board participation might perceive any number of challenges. How will other board members react to youth board members? Do youth have what it takes to be full participants? Is it worth addressing the legal and liability issues that involving youth might present?

Findings reveal that the benefits of including youth outweigh perceived challenges. Comparing youth-serving community-based organizations that have youth client/consumers on their boards to youth-serving organizations that do not, the following significant findings emerge.<sup>5</sup>

*Youth-serving organizations with youth client/consumer board representation:*

- **Have significantly more positive attitudes about youth board participation.** Using a composite of attitudes associated with client/consumer board participation, youth-serving organizations with youth client/consumers on their boards score statistically significantly higher than other youth-serving organizations. Out of a possible score of 55, those organizations with youth serving as client/consumer board members score an average of 46 as compared with 41 for youth-serving organizations without youth board involvement (ANOVA,  $p < 0.001$ ).
- **See there is an advantage to having youth client/consumers on their board.** Youth-serving organizations with youth board representation are more likely to say "client/consumer board membership is advantageous" compared with other youth-serving organizations (mean=3.3 compared with 2.6, respectively; ANOVA,  $p < 0.001$ ).
- **Say client/consumer board members are readily accepted by other board members.** Youth-serving organizations with youth board representation more strongly agree than other youth-serving organizations that "client/consumer board members are readily accepted by other board members" (mean=4.2 compared with 3.6, respectively; ANOVA,  $p < 0.001$ ).
- **Reject the notion that youth client/consumers do not have the skills needed.** Compared to other youth-serving organizations, those with youth client/consumers on board strongly disagree with the statement that "Our clients are not prepared or skilled to deal with the complex materials and issues of the organization" (mean=3.8 compared with 3.2, respectively; ANOVA,  $p < 0.001$ ).

<sup>4</sup> These findings are also included in *Youth and Board Service*, the National Assembly's report on its survey of youth who have served on boards of directors.

<sup>5</sup> For purposes of this analysis, youth-serving organizations are defined as those with an explicit mission to serve children and youth.

### *Successes in Overcoming Barriers to Client/Consumer Board Participation*

Organizations may perceive various types of barriers to including client/consumers as board members. These barriers are often specific to the population in question. For example, meeting times and transportation are particular barriers for adolescent and young adult board members. Two specific barriers—access to resources required for board service and convenience of meeting times—are examined.

Board service is a volunteer activity that assumes a level of personal resources on the part of the volunteer that can be applied toward the cost of serving. This assumption might pose a barrier for low-income individuals to participate as board members. The survey data reveal that many low-income-serving organizations with client/consumer board representatives have addressed the resource barrier by providing reimbursement for transportation expenses and meals. Low-income-serving organizations *with* client/consumer board members are significantly more likely than low-income-serving organizations *without* client/consumer board members to reimburse board members for meals (35% compared with 23%;  $\chi^2$ ,  $p=0.051$ ) and transportation expenses (25% compared with 13%;  $\chi^2$ ,  $p=0.015$ ).

#### **Worthy of Note**

Low-income-serving organizations facilitate board service for their low-income client/consumers by reimbursing for transportation and meal expenses.

For many client/consumer populations—including youth and others who have limited flexibility in their daily schedules—weekday board meetings render board service impractical. This barrier can be overcome by creative scheduling; in fact, many of the organizations surveyed have taken this approach. Organizations with board meetings on weekday evenings (mean=4.2) and weekend afternoon/evenings (4.3) give higher ratings than boards that meet during weekday working hours (3.4) regarding how practical the meeting time is for client/consumer board participants (ANOVA,  $p<0.001$ ).

#### **Worthy of Note**

Alternative board meeting times, such as weekday evenings and weekends, facilitate board service for potential client/consumer participants.

### *National Membership Organizations and Their Community-Based Affiliates: The Relationship for Organizational Climate Regarding Client/Consumer Board Participation*

As reported earlier, the prevalence of client/consumer board participation at the affiliate level is associated with client/consumer board participation at the national level. But, what is the relationship in terms of organizational climate? In general, few significant relationships were found, although those that do emerge reinforce the concept that national membership organizations can exercise a good deal of influence over local affiliates in their consideration and practice of client/consumer inclusion.

Formal discussions on the issue have been shown to significantly relate to actual client/consumer board participation. Local affiliate organizations are more likely to have had a formal discussion about client/consumer board participation if the national parent organization has had such a discussion (64% compared with 55% of affiliates whose national board have *not* discussed the issue;  $\chi^2$ ,  $p=0.019$ ).

The same relationship holds for perceptions of one barrier to client/consumer board participation: whether or not client/consumers can afford the time and money required by board service. Affiliate organizations are significantly less likely to agree that clients cannot afford the time or money needed for board service if the national organization does not perceive these barriers (mean agreement score=3.1 compared with 3.5 for community-based organizations whose national office perceive lack of time and money as a barrier; ANOVA,  $p<0.001$ ).

Equally important are the relationships that did not emerge as significant. There is no relationship between national member organizations having a written policy or having particular opinions of and attitudes towards client/consumer participation and local affiliates having similar policies or views. This suggests that while the national membership organization can have some influence on the practice of its local affiliates, the decision-making process for whether an organization could and should include client/consumers as board members remains highly individualized. For example, local laws can restrict who has voting rights, thus limiting eligibility for board service.

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## CONCLUSION

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This study has helped to surface insights into the prevalence and perceptions of client/consumer participation on nonprofit boards of directors. It contributes to an understanding of organizational issues as well as practices related to client/consumer inclusion.

Because the study employed a convenience rather than a randomly selected sample of nonprofit organizations, it is not possible to generalize the results across the entire universe of nonprofits. But the significant size of the sample—more than 1200 affiliates of national nonprofit organizations—adds credibility to the survey finding that client/consumer board participation is prevalent, with half of these agencies reporting that their boards include client/consumer participants. The large sample also lends confidence in the findings related to attitudes toward and commitment to client/consumer participation.

The practice of client/consumer participation can take on different forms for different organizations. Some organizations include actual client/consumers in governance, while others include surrogates such as family members and caregivers. At the same time that these practices are becoming prevalent, research on organizational development is beginning to suggest that client/consumer involvement will improve organizational effectiveness.<sup>6</sup> The convergence of practice and theory provides a unique opportunity to continue the research on client/consumer board participation—building upon the foundation that this National Assembly project has laid—in order to help nonprofits quantify the “bottom line” benefit of client/consumer participation.



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<sup>6</sup> *Organizational Capacity-Building and Related Foundation-Sponsored Projects: A Focus on Organizational Effectiveness Revealed.* A paper prepared by BTW Consultants – informing change, April 1999.