At one point in my career, I found myself serving on six boards simultaneously. Each board was a nonprofit and most had recruited me for similar reasons. Yet I observed that, over time, I came to function and behave quite differently on each board. I was the same person with the same skill sets, so what motivated me to give more of myself on some boards than on others?

As a psychologist, I ventured beyond my introspection and began to study individual and group dynamics of board behavior with an eye for the kinds of cognitive strategies and other factors that enhance the responsiveness and productivity of boards and board members. One of the things I noticed first was that the most apparently efficient boards — those with well-defined agendas acted on in timely ways within the constraints of Robert’s Rules — were often the least visionary and in-touch. Within this subset, those boards with financial challenges often responded by micromanaging the budget rather than coming up with innovative social marketing plans or new programming to attract new students or members. A few visionary people served on these boards, but the culture and proscribed process didn't encourage their creative response. Creative problem-solving lost out to quick-fix solutions. Other boards seemed to be in a perpetual state of strategic planning, but never opened themselves up to the really essential (and messy) questions that could lead them to necessary course corrections in their programs or outreach.

Then there were the boards in crisis mode that lived "in the moment," on the brink of imminent demise. These can be depressing experiences, but one such board, one that inspired my best board behavior and passion for leadership, was for a performing arts school of 30 students that now, ten years later, serves over 1,000 students. Interestingly, our crisis mode created a board culture that allowed for a freewheeling brainstorming style that gave us permission to think, work, and speak "outside the agenda." Our meetings were on Sunday nights — not my favorite time to meet. And, in the traditional sense, we didn't have the strongest team of potential members. Yet, there was something about the passion for the organization and the interesting, often conflictual, exchange of ideas that kept me coming back. We knew why we were there and what the values and visions of the organization were because we hashed them out continually. I served on that board for almost eight years and stayed connected for years more.

Ultimately, I came to learn, effective board members get more personal satisfaction — and contribute more to their schools and other institutions — when they engage in what organizational theorists call the "cognitively complex" processes, or the "generative mode," a term elaborated by Richard Chait of the Harvard School of Education to encompass the big-picture thinking that must accompany or precede the fiduciary and strategic modes of thought we are all more familiar with in our board experiences.

WHY A BIG-PICTURE PERSPECTIVE?
The 21st century is the global century — that is, a century in which cooperation among nations is absolutely essential — and it has brought with it a recognition that young people require, on the one hand, a high level of academic preparation, cultural competence, and civic empowerment, and, on the other, the ability to think creatively and resourcefully. Indeed, over the course of the last half century, education has evolved from its focus on filling the "cup of knowledge" to a focus on helping students hone their communication and research skills, think critically, solve problems, develop flexibility, learn to work in diverse groups, and be innovative. Most of us also hope to help students think beyond themselves, behave ethically, and live in a manner that helps sustain the planet. It's no small task to provide the curriculum and climates for this learning and development to occur.
Independent schools are often ahead of the curve in considering how issues like global sustainability interface with educational policy. At the same time, independent schools face significant challenges. In these complex times, we know that our choice is really between envisioning and managing change or letting change have its way. Yet, there is something in many of us that resists such engagement with change. In schools with great histories, the traditions and past successes make it even harder to recognize the need to evolve.

**THE CHALLENGE**

One of the pitfalls for nonprofit and independent school boards is that collective board behavior can easily fall into routine or old-fashioned expedient behavior that does not allow the time or the process needed to address long-range challenges or philosophical questions about how schools keep their vision in changing times. A board is a micro social system. Its culture tends to codify quickly with a set of self-limiting internal expectations. Maybe you have seen it happen. New board members come in with great energy and ideas. Within a few meetings, they seem to be less enthused and suddenly reactive rather than proactive. Rather than deliver, say, the new marketing ideas or the revitalized fund-raising the board sought from them, these new members start micromanaging the school webpage or redesigning the budget format. This occurs partly as a result of old ways of running meetings (such as Robert's Rules of Order) and partly as a result of human dynamics. Strong personalities can dominate the interaction, and, without clearly defined roles, people in general and board members in particular tend to default to what they know well or do easily.

The challenge for independent school boards is to develop the same high level of thinking and process that schools want to elicit from our students.

As we know, in the classroom, good schools have moved from an emphasis solely on critical thinking, which reacts to what is, to an understanding that creative thinking, collaboration, and productive ideas are equally important. In order to sustain and develop great schools that prepare students for the real world, boards also have to move out of their collective comfort zones and become big-picture — or generative — boards in their thinking and functioning. These boards create an exciting, if sometimes anxious, environment for discussing the pressing questions and a no-holds-barred exploration of new ideas for answering those questions. I often call this work "taking the water-tower view," which is a matter of designing processes that allow your board to mentally climb an imagined water tower and to look down at the landscape — the big picture. Depending on what you see, you may then climb down and do a "soil analysis" to test its readiness for either the old crop or a new one. If a board member expects to engage in discussion of the big issues, rather than passively listen to reports of functional committees, he or she will do some creative and generative thinking even before he or she enters the meeting. This mindset, especially when shared throughout the board, can dramatically change the quality of output.

Richard Chait, in his studies of board practices, notes three kinds of thinking essential to good board functioning: generative thinking, strategic thinking, and fiduciary thinking. The "generative mode" introduces into every meeting the more flexible and productive process that often occurs on board retreats (see sidebar). Generative thinking looks at happy accidents that created a sense of community or an unusually successful event. It also looks analytically at unsuccessful ventures and asks, "Did we operate from untested assumptions?" Generative thinking by boards and staff might break barriers by asking the what-if questions (i.e., "What if we allowed food in the library — would students spend more time there?"). It runs the risk of challenging sacred cows or questioning traditions. Generative process in a school growth campaign might cause board members to explore why prospective students didn't accept admission or why some enrolled students choose to leave. They may ask current students and parents to be in continued dialogue about what works for them in the school and what doesn't. It may lead to
discussions that open the proverbial "can of worms," but it also recognizes that worms improve the soil for growth!

**Big-picture, generative boards are different**

In *Governance as Leadership: Reframing the Work of Nonprofit Boards*, Richard P. Chait, William P. Ryan, and Barbara E. Taylor call the leadership of generative boards *Type III trusteeship*. The hallmark characteristics of the generative (big-picture) mode can be summarized as follows:

- **A different view of organizations**: Organizations do not travel in straight lines and a rational course from vision to mission to goals to strategy to execution.

- **A different definition of leadership**: Leaders enable organizations to move forward and confront complex value-laden problems that defy a "right" answer or perfect solution.

- **A different mindset**: Beyond fiduciary stewardship and strategic partnership, governance is tantamount to leadership.

- **A different role**: The board becomes an asset that creates added value and comparative advantage for the organization.

- **A different way of thinking**: Boards are intellectually playful and inventive as well as logical and linear.

- **A different notion of work**: The board frames higher-order problems... and asks questions that are more catalytic than operational.

- **A different way to do business**: The board relies more on retreat-like meetings, teamwork, robust discourse, work at the organization's boundaries, and performance metrics linked to organizational learning.

Generative governance empowers the board to do meaningful work, engages the board's "collective mind," enriches the board's influence and interest, and enhances the board's value to the organization.

**CREATING A GENERATIVE BOARD CULTURE**

It often takes significant challenges, or the recognition of real challenges ahead, to get a board to consider a change in its way of doing business. So, in order to create a generative board, it can be effective to start by asking board members to individually generate a list of the leading short-term and long-term challenges the school faces. You may want to momentarily take the "fund-raising" response off the table so that thinking goes beyond fund-raising, which too many individual board members consider to be their greatest challenge. Since successes in other areas — sustainability, growth, and partnerships, for example — often go a long way toward solving resource problems, I consider raising money secondary in the generative stages of thinking. In other words, generative thinking needs to be considered before fiduciary or strategic challenges can be properly addressed. Build out from the list of challenges to bigger questions. If people say that limited parking is a problem, then you must ask focusing questions. Why is limited parking problematic to the goals of the organization? Is there a growing need for staff and
students who drive? Why? In other words, is the parking problem indicative of a growth issue (you've doubled your enrollment), a transportation issue (you don't provide or encourage group transport), a culture issue (student status), or even a neighborhood issue (parking on the street makes neighbors angry)? Depending on the "why," your solutions may vary considerably.

In my Educational Psychology class, I talk with students about spending as much time creating and posing questions as they spend answering them. These exercises help make them much better thinkers and problem solvers than they'd otherwise be. The same is true with boards. School heads, by the nature of their jobs, move in and out of generative thinking all the time and can often help a board chair frame the questions with which a board should wrestle. Given their multiple perspectives, board members will then look at the questions through multiple "frames." It is like looking into a house through different windows. This adds richness of perception to a full understanding of a school and expands potential as long as the board interaction takes advantage of the collective view.

My daughter's third-grade teacher taught her to ask and answer "What If?" questions in her journaling. That year she wrote rich and interesting stories. The next year, she had a teacher who wanted her to "stick to the facts" in her journal writing. She was asked to write about what she did. I'm sad to say I watched her writing become sparser and less textured, even though she had a larger vocabulary. Same girl. Same pen. The difference in her productivity and creativity was all about the assignment and the culture of that fourth-grade classroom.

So how do you break the bad habits if your board has a preoccupation with fixed agendas, crisp reports, and reactive thought processes? In my consulting, I recommend the creative problem-solving model presented by Edward De Bono in his book *Six Thinking Hats* (or taught through the De Bono Institute). Casting off artificial, discussion-limiting structures, DeBono's work has been proven to raise profits and rapidly escalate creative problem-solving in businesses around the world.

The DeBono model relegates "critical thinking" to its proper place as only a part of the problem-solving process. Very simply, his process segments the dialogue and thinking about an issue into six types of thought — or, as he puts it, six colors of thinking "hats."

When wearing the white hat, we are concerned with available facts and figures and what information is missing. If facts are offered, we ask where they came from and if they've been checked. In white-hat mode, we don't interpret. If there isn't enough objective information, our group isn't going to proceed until the facts are in. Quite a time saver.

When wearing the red hat, we allow emotions to surface, knowing that important information is embedded there. It allows for a group "gut check," encouraging intuitive knowledge, on the one hand, and addressing negative emotions, on the other. In the red-hat stage, people can express hunches and gut feelings, frustrations and complaints. The honesty is essential and, ultimately, improves teamwork.

The black hat is the hat of caution, or flat-out survival. It is our critical-thinking hat, and the one that most of us feel most comfortable wearing. Although it is often overused, it is still important. It allows us to look at the past and at future projections with a critical eye. It is also the hat that can keep us from making serious mistakes.

The yellow hat encourages optimism. We look for the silver lining in a situation or the benefit in an otherwise imperfect plan. We engage in positive thinking and keep ourselves open to possibilities. Sophisticated people sometimes need encouragement to engage in yellow-hat thinking. They fear it makes them seem unrealistic. But such optimism also has the potential to create a significant paradigm shift.
The green hat is for "green-light thinking." It encourages the safe offering of ideas and brainstorming. One idea is allowed to build on another. It is also an optimistic stage that requires everyone to try new approaches or consider new perspectives on problems. Judgment and criticism are not allowed during green-hat thinking. It is playful and provocative and deals with forward movement. It can involve the logic of the absurd. Under the green hat, new ideas can be shaped and tailored. Inventors spend lots of time in yellow- and green-hat thinking. They are about finding alternatives.

The blue hat is the meta-cognitive hat. It is for thinking about how you are thinking as a group. It asks if you are asking the right questions. It defines the problem with greater precision. Crystalline focus is the goal. Are we spending our time with the right tasks to solve this problem? Wearing the blue hat, you might even decide in which order you will use the other hats. (Hats can be revisited and rearranged). The blue-hat thinker comments on what he or she observes in the group and articulates the overview. The blue-hat thinker is like the orchestra conductor working to make all the pieces harmonize. In blue-hat mode, we also summarize and develop final reports.

The real advantage (and the trick) to using the DeBono model is that all members have to stick to the mode of thought that the group is in at any given moment. Usually the facilitator or board chair declares which hat the members are wearing and all must agree to abide by the hat's guidelines. Feedback from the business community on this process indicates that this change in the manner of processing issues and problems actually saves time in meetings once the form is learned. It also reduces the number of times the same issues are revisited.

Last year, I used this model to discuss the use of volunteers with a group of administrators. Administrators often have a love-hate relationship with volunteers. The organization I was working with had limited funds and we could not understand why the administrators were not using more volunteers since many people seemed interested in the organization's mission. In the red-hat (gut-check) stage of thinking, the administrators were able to express their ambivalence about volunteers — about how time-consuming and sometime unreliable volunteers could be. With this sentiment aired, the group was able to freely consider how volunteers broaden the base of the organization, how friend-raising leads to fund-raising, how to assess which tasks required training, and how to make volunteer work meaningful for both volunteers and the organization. Also underlying the discussion was a fear that volunteers would "judge" the administrators. The thinking-hat structure allowed them to understand that volunteers could forward the organization's vision and improve the lives of its "at-risk" students while reducing costs.

A FAILURE AVERTED
In 1970, a historic women's college celebrated its 100th anniversary with a commencement speech by Walter Cronkite on the value of education for women and on the inspired vision of the college's founder. The 1970 graduating class was the largest in the school's 100-year history. During the 1960s, the school had grown, added new dorms, and purchased more land in anticipation of the Baby Boom generation. But by the late 1970s, the college's board of directors wrote the alumnae that it was going to close the college because women's-only education was no longer relevant or desired by most college-bound women in the "very selective" range. The alumnae rose up and challenged the board members, many of whom resigned. With fresh blood and fresh thinking, the college proceeded to create on its grounds one of the first sustainable living communities in the U.S. and expanded enrollment to admit female students of all ages, educating the "non-traditional" student. Men were invited to study as guests, but the mission of the college didn't change. It remained a college for women. In the 1980s, women equestrians were allowed to bring their horses to college. For decades, the school has graduated more women who have gone on to earn PhD's in science than any other liberal arts school.

In the current decade, this college's board thought outside the box again and set up a dorm for female students with children who wished to live on campus. Now, there are babies in the dining hall and the
women enjoy the family atmosphere. Lively programming has made the college more of a community member and less of an Ivory Tower. The more recent board keeps its generative lens on wide focus, its doors open to students, and its community in mind. The result is that the college is thriving, and ready to take on the next challenge.

I think the founder would be proud.

**KEEPING IT FUN**

Staying creative in the board process can be helped by small strategies such as placing toys, puzzles, and drawing paper on the board table or, better still, getting out from behind that familiar table. Meet while walking the campus. Meet at different times of day (studies show we think differently in the morning than at night). Change seats. Do team building exercises. Have a Socratic session where only questions are formed and refined but not answered. Visit the competition. Talk to the students in places where they are comfortable. Draw your ideas instead of writing them. Celebrate victories. Silence your inner critic for one whole meeting. Think green. Think about ways to identify and build on strengths. Ask "what if"? And lead from there. Govern your school through a big-picture window of mission and creativity, not a small porthole of preservation and habit. Your students, the citizens of tomorrow, and your community will thank you.

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**References**


- See more at: http://www.nais.org/Magazines-Newsletters/ISMagazine/Pages/The-Big-Picture-Board.aspx#sthash.LMi2Z8QE.dpuf