

Tuesdays at Ten: Governance Drives Mission & Performance IDD & Behavioral Health

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Meet the Presenters



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Agenda & Learning Objectives

- 1. Strengthen governance oversight** – interpret key dashboards, monitor performance, and ensure compliance across agencies.
- 2. Improve board decision making** – critical questions, evaluation of risks, and alignment of choices with mission-driven outcomes.
- 3. Build strategic leadership skills** – increase confidence, clarity, and effectiveness in guiding agencies through today’s complex operating environment.



Fiduciary Duties of a Nonprofit Board

Board members have a legal and ethical responsibility to act in the best interest of the organization and the mission.

“Effective governance includes fiduciary duties: care, loyalty, and obedience to the mission”

Fiduciary Duties of a Nonprofit Board (continued)

Duty of Care

Act with the level of care an informed, prudent person would use.

Prepare for meetings and ask thoughtful questions.

Use reliable information to make decisions.

Duty of Obedience

Ensure the organization stays true to its mission.

Follow applicable laws, regulations, and governing documents.

Use resources only for approved, mission-aligned purposes.

Duty of Loyalty

Put the organization's interests ahead of personal interests.

Disclose and manage conflicts of interest.

Avoid decisions that benefit individuals at the expense of the mission.

What This Means in Practice

Understand financial and program information.

Oversee risk, compliance, and leadership performance.

Make decisions that protect public trust and long-term sustainability.

Governance: Beyond Compliance

- Governance is direction and stewardship
 - It sets priorities aligns resources to mission, and clarifies accountability—not just approvals or checklists
- Oversight that improves performance
 - Effective boards monitor outcomes, challenge assumptions, and use transparency to strengthen decisions
- Proactive risk and ethical leadership
 - Governance is a dynamic system that shapes culture, supports innovation, and drives excellence beyond compliance

Questions to ask:

- How does our governance protect and advance the mission?
- What fiduciary responsibilities do we hold on behalf of the community?
- Where does the board add the most value today?

Governance vs. Management

- Governance (Board)
 - Sets direction, oversees risk and performance, and holds leadership accountable
- Management (Leadership Team)
 - Executes strategy and manages day-to-day operations to deliver results
- Why Role Clarity Matters
 - Clear delegation and regular evaluation prevent inefficiency and mission drift, strengthening decisions and resilience

Questions to ask:

- Are we focused on oversight rather than day-to-day operations?
- What decisions belong to the board versus management?
- Where are roles unclear or overlapping?

Why Governance Matters Today

- Pressures are rising
 - Resource constraints, tighter regulation, workforce challenge, and complex funding models raise the stakes for board decisions
- Risk and accountability
 - Boards must anticipate evolving risks-budget cuts, compliance audits, and public scrutiny while protecting mission and reputation
- What strong governance enables
 - Proactive risk management, strategic resource allocation, and transparent communication—supported by continuous improvement and board education

Questions to ask:

- What external risks could most affect our mission?
- Where could loss of public trust do the most harm?
- Are we prepared for funding or regulatory changes?

Mission as the Anchor

- Purpose vs. Path
 - Mission defines why the organization exists; strategy defines how it will succeed
- Governance Keeps Alignment
 - Boards ensure decisions and resources stay tied to purpose—not distractions
- A Practical Board Habit
 - Evaluate opportunities and risks by asking: “Does this advance the mission and build trust?”

Questions to ask:

- How does this decision advance our mission?
- Who benefits most from this work?
- What mission trade-offs are we making?

Recognizing Mission Drift

- What it looks like
 - Mission drift happens when programs chase funding over purpose, growth outpaces capacity, or decisions become reactive
- Warning signs
 - Misaligned initiatives, diluted impact, and stakeholder confusion are common indicators
- Board role
 - Challenge proposals, monitor outcomes, and maintain strategic focus to prevent drift
- Realignment tips
 - Use case studies to identify what worked, then clarify priorities and test measures—improving performance and sustainability

Questions to ask:

- Are we doing work that no longer aligns with our purpose?
- Which programs consume resources without clear impact?
- What would mission drift look like for us?

Strengthening Governance Oversight: From Mission to Metrics

- Govern with a clear line of sight
 - Link mission to strategy, metrics, and accountability—not just financial results
- Measure outcomes that matter
 - Use balanced scorecards, impact dashboards, and regular reviews to track progress
- Align resources and incentives
 - Build continuous improvement and stakeholder engagement through mission-driven decisions

Questions to ask:

- How do we define success for the people we serve?
- Which outcomes matter most—not just activities?
- How do we know our programs are working?

What Performance Means

- Holistic definition
 - Performance includes mission impact, financial sustainability, risk management, compliance, and long-term viability
- Balanced measures
 - Boards should integrate qualitative insight with quantitative metrics to avoid over-optimizing any single area
- Board oversight cycle
 - Set clear expectations, monitor progress, learn from cases that balance outcomes with operational excellence, and adapt strategy as needed

Questions to ask:

- Are we measuring what truly matters?
- What trends concern us most?
- What do these results tell us about impact?

Financial Oversight

- Strategy-aligned budgets
 - Approve budgets ties to strategy so resources prioritize mission-critical work and long-term sustainability
- Liquidity, reserves, and risk
 - Monitor cash flow, reserves, and key financial risks to maintain stability during uncertainty
- Transparency and accountability
 - Use regular reviews, scenario planning, and probing questions to test assumptions and forecasts

Questions to ask:

- Do our spending priorities reflect our mission?
- How sustainable is our funding model?
- What financial risks could limit our ability to serve?

Risk Oversight

- What it covers
 - Financial, operations, compliance, reputations, and strategic risks
- Board responsibilities
 - Clarify risk appetite, monitor evolving threats, and validate strong internal controls
- How to apply
 - Use assessment and mitigation frameworks; embed risk discussions into regular meetings

Questions to ask:

- What is our top mission-critical risk right now?
- How prepared are we if this risk occurs?
- How quickly would we know if something went wrong?

Information Quality

- What breaks governance
 - Boards underperform when information is late, overly detailed, or not actionable for decisions
- What effective boards ask for
 - Dashboards tied to strategy, trend analysis, and forward-looking indicators—not static reporting
- How to sustain quality
 - Clear reporting standards and regular management-board communication improve decisions and outcomes

Questions to ask:

- Does this information help us make decisions?
- What do we still need to see?
- Are we looking forward—or only backward?

Accountability

- What it requires
 - Clear expectations, defined authority, performance evaluation, and consistent follow-up
- Board's role
 - Hold leadership accountable for results, address underperformance, and recognize success
- How to build the culture
 - Use formal evaluations, measurable goals, and constructive feedback to drive continuous improvement

Questions to ask:

- Who owns these results?
- What happens if targets are missed?
- How do we support leadership while holding them accountable?

Governance Maturity Model

Compliance-
Focused

Oversight-
Focused

Strategic
Governance

Mission-Dirven
Performance
Governance

Leading Practices

Things to think about

- Where are we strongest as a board?
- Where do we need to improve?
- What one change would most strengthen governance?
- Self-Assessment
- Committee Charters
- Focused Agendas
- Board Education
- Succession Planning
- Case Studies
- Do we have the right skills and perspectives on the board?
- How are we developing board members?
- Are our agendas focused on strategy and impact?

Governance Culture

- What high-performing boards show
 - Constructive challenge, trust, transparency, respectful dissent, and a mission-first mindset
- Why culture matters
 - It shapes decision making, risk tolerance, and how the board engages stakeholders
- Build and sustain it
 - Set norms for open dialogue, invite diverse perspectives, and model ethical leadership

Questions to ask:

- Is bad news surfaced early and discussed openly?
- Do we encourage respectful challenge?
- What behaviors are we modeling as board members?

Board-Level Dashboards: What Nonprofit Boards Should See

Status: ● On Track | ● Watch | ● At Risk

Mission & Impact Dashboard (*Operational*)

Purpose: Confirm the organization is delivering on its mission

Key measures

Core mission outcomes (2–4 headline indicators)

Clients served vs. target

Outcome trends over time

Equity or access indicators (where relevant)

Board asks

Are outcomes improving or declining?

Are we serving the people we intend to serve?

Key outcomes

**Clients achieving intended outcome:
72% (↑ 5%)**

**Clients served vs. target: 1,250 /
1,300**

Access indicator: Stable

Board-Level Dashboards: What Nonprofit Boards Should See

Status: ● On Track | ● Watch | ● At Risk

Program Performance Dashboard (*Operational*)

Purpose: Compare effectiveness across programs

Key measures

Program outcomes vs. goals

Cost per outcome (not just cost per client)

Capacity utilization

Programs flagged as “watch items”

Board asks

Which programs deliver the greatest impact?

Where should we invest more—or less?

Program	Outcome vs. Goal	Cost per Outcome	Status
Program A	Above target	\$1,200	●
Program B	Slightly below	\$1,850	●
Program C	Below target	\$2,400	●

Board-Level Dashboards: What Nonprofit Boards Should See

Status: ● On Track | ● Watch | ● At Risk

Executive & Organizational Health Dashboard *(Operational)*

Purpose: Ensure leadership and operations are sustainable

Key measures

Leadership stability and vacancies
Staff turnover and engagement indicators
Key operational risks or constraints
Succession planning status

Board asks

Do we have the leadership capacity to execute strategy?
Where are people or systems stretched too thin?

Executive & Organizational Health

Leadership stability: Stable
Staff turnover: 18% (↑)
Succession planning: Partial

Board-Level Dashboards: What Nonprofit Boards Should See

Status: ● On Track | ● Watch | ● At Risk

Fiscal Dashboards

Financial Position Dashboard (*Fiscal*)

Purpose: Understand current financial strength

Key measures

Cash on hand (months)

Operating surplus or deficit (YTD)

Liquidity trends

Net asset composition (restricted vs. unrestricted)

Board asks

How strong is our financial position today?

Are there early warning signs?

What trends need attention?

Financial Position (Can We Sustain It?)

Liquidity

Cash on hand: 4.5 months (↓ from 5.2)

Operating results

YTD surplus / (deficit): (\$150K)

Forecast year-end: Break-even

Board-Level Dashboards: What Nonprofit Boards Should See

Status: ● On Track | ● Watch | ● At Risk

Budget vs. Actual Dashboard (*Fiscal*)

Purpose: Monitor financial performance against plan

Key measures

Revenue and expense variance
Program-level variances (high level)
Explanations for material variances
Updated forecast

Board asks

Are we on track financially?
What assumptions have changed?

Items to include

Summary metrics

Total Revenue: Budget / Actual / Variance
Total Expenses: Budget / Actual / Variance
Net Income: Budget / Actual / Variance

Variance highlights

Top positive variances
Top negative variances
Items with material variance (e.g., >5%)

Board-Level Dashboards: What Nonprofit Boards Should See

Status: ● On Track | ● Watch | ● At Risk

Revenue & Funding Mix Dashboard (*Fiscal*)

Purpose: Assess sustainability and concentration risk

Key measures

Revenue by source (grants, donations, contracts, fees)

Top funder concentration

Restricted vs. flexible funding

Pipeline outlook

Board asks

How dependent are we on a small number of funders?

How flexible is our funding model?

Revenue & Funding Mix (How We Are Funded)

Government contracts: 45%

Foundations: 30%

Individual donors: 20%

Other: 5%

Concentration risk

Top 3 funders: 52% of revenue

Board-Level Dashboards: What Nonprofit Boards Should See

Status: ● On Track | ● Watch | ● At Risk

Risk & Compliance Dashboard (*Operational + Fiscal*)

Purpose: Protect mission and public trust

Key measures

Top enterprise risks (ranked)

Compliance status (regulatory, grant, contractual)

Audit findings or issues

Open risk mitigation actions

Board asks

What could most harm the organization?

How prepared are we?

Indicator	Trend	Status
Top enterprise risk exposure	→	●
Compliance issues open	→	●
Audit findings	→	●
Staffing risk	↑	●
Data / reporting risk	→	●

Board-Level Dashboards: What Nonprofit Boards Should See

Status: ● On Track | ● Watch | ● At Risk

What Makes a “Board-Ready” Dashboard

Boards should see:

5–10 key indicators per dashboard

Trends, not raw data

Clear red / yellow / green signals

Brief management commentary (“what changed and why”)

Boards should not see:

Operational task lists

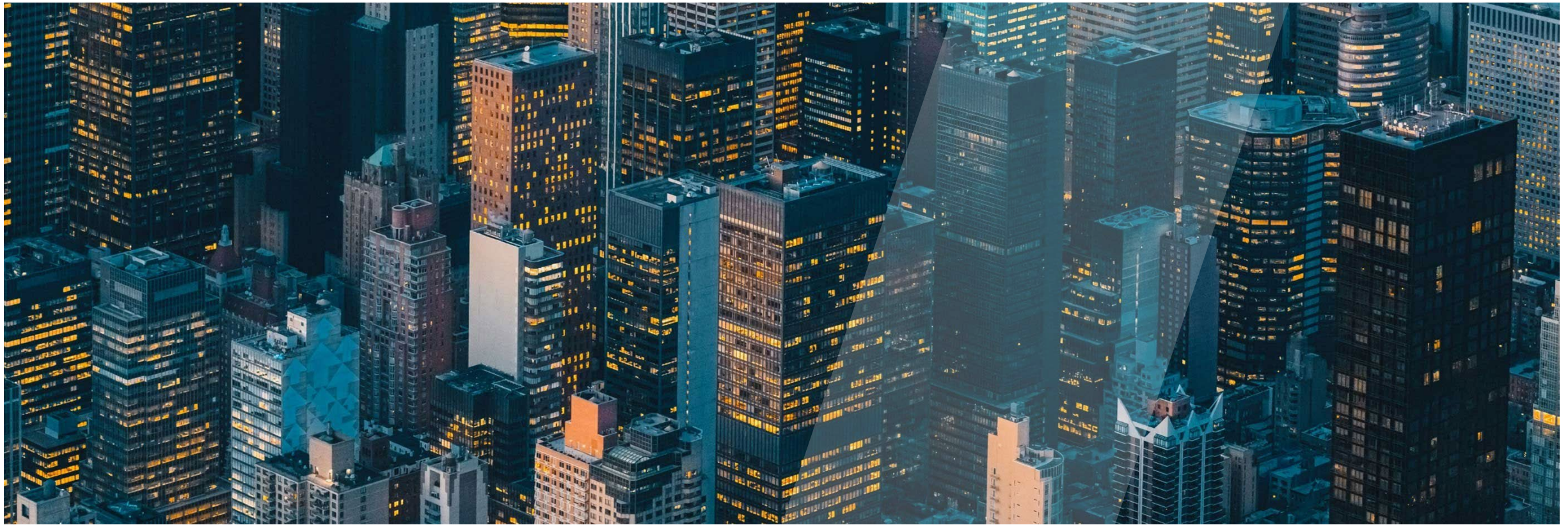
Excessive detail

Unfiltered reports

Indicator	Trend	Status
Clients achieving intended outcome	↑	●
Clients served vs. target	→	●
Program completion rate	↓	●
Equity / access measure	→	●
Client satisfaction	↓	●

Key Takeaways

- Governance clarifies mission
 - Governance drives mission clarity and keeps decision making aligned with purpose
- Performance follows governance
 - Strong governance directly impacts outcomes through clear roles, metrics, and oversight
- Governance is strategic
 - Trust governance as an asset that strengthens resilience and long-term value
- Board focus for action
 - Prioritize alignment, accountability, and continuous improvement—then bring questions to Q&A
- What is one question we will commit to asking regularly?
- What will we do differently after today?
- How will we know governance has improved?



Thank you!

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