

MAXIMIZING BOARD ENGAGEMENT & EFFECTIVENESS

Stop guessing and start addressing the needs of your board.



INTRODUCTION

An engaged board is vital to the sustainability of a nonprofit—from fundraising to community relations to governance. Unfortunately, many organizations suffer from low board engagement. A 2013 survey conducted by StreamLink Software and the Axelson Center for Nonprofit Management uncovers the motivations and drivers of board members.

In this report, we outline the symptoms (and underlying causes) of disengaged board members, debunk myths, and share steps you can take to increase engagement and future-proof your nonprofit board.

Stop guessing, and start addressing the needs of your board.

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METHODOLOGY

StreamLink Software partnered with the Axelson Center for Nonprofit Management to conduct a nationwide survey **to better understand how board members perceive engagement within their organizations.**

The survey consisted of 30 multiple choice and short answer questions. Responses were solicited through LinkedIn Groups, Facebook, Twitter, Axelson Center and BoardSource, and collected via SurveyMonkey. Fifty-eight individuals serving on one or more boards responded to the survey.

STATISTICAL SIGNIFICANCE

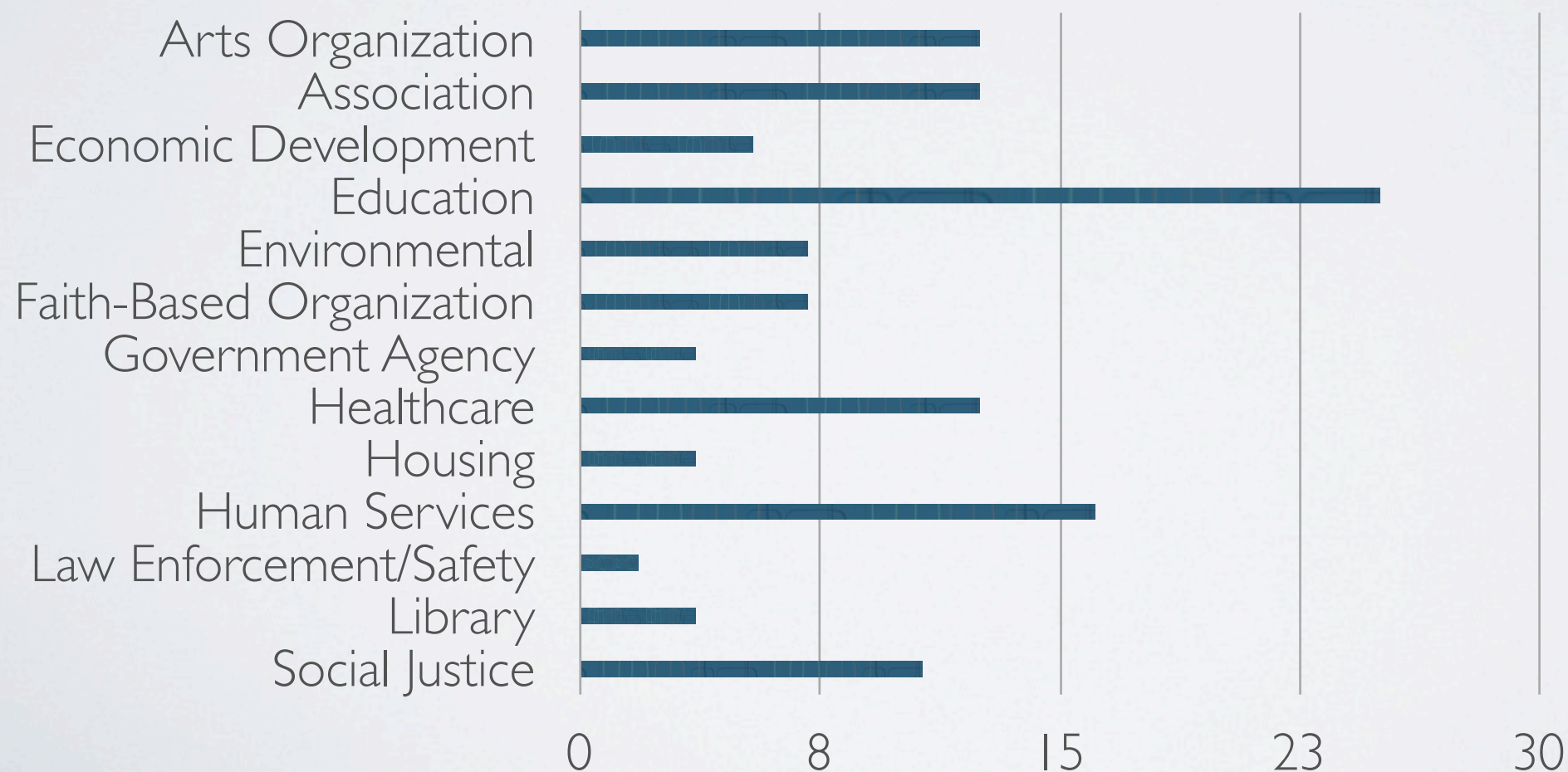
The respondents form a convenience sample. There is no margin of error or measure of statistical significance using this sampling technique, as it is not a random sample of the population studied.

Actual board engagement levels may be lower, as engaged board members are more likely to voluntarily complete a survey. Through this sampling of individuals, we can begin to understand, anecdotally, the underlying perceptions of engagement and motivations of board members.

RESPONDENT CHARACTERISTICS

- **Organization sector:** Respondents serve on boards across sectors, with the two most common sectors being education (25.0%) and human services (16.1%).
- **Board participation:** 44.6% of respondents currently serve on two boards; 37.5% serve on one board.
- **Committee participation:** 37.5% serve on one committee; 25.0% serve on two committees.

Respondents' Organization Sector (shown by %)



SYMPTOMS

The board is the lifeblood of a nonprofit organization: hiring and evaluating executives, spearheading fundraising efforts, mitigating risk through compliance oversight and good governance, ensuring the long-term sustainability of the organization, and ultimately shaping the strategic direction of the organization and fulfillment of the mission. So when a board suffers from low engagement, **it puts the entire organization in jeopardy.**

According to survey results, **one in four board members aren't fully engaged with the mission of the organization.**

MEASURING ENGAGEMENT

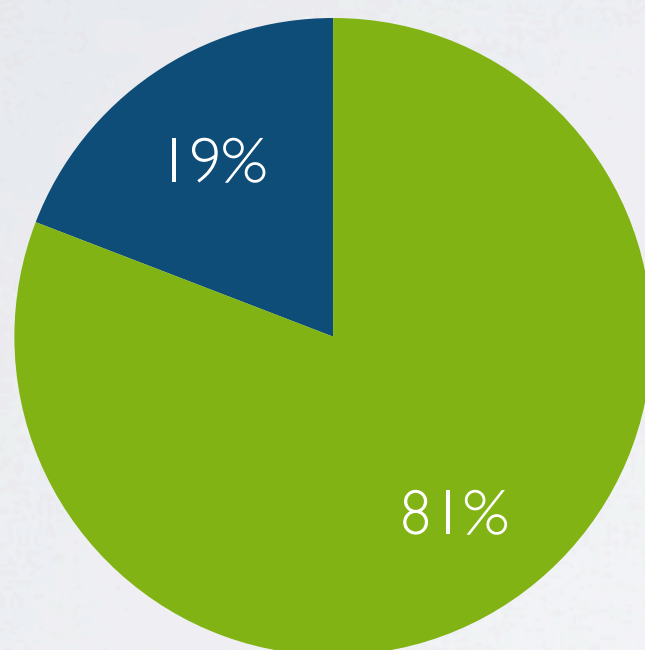
The reasons behind joining a board are varying and complex, with each board member having unique reasons for joining and shifting motivations for staying on the board long-term. But all board members should be united by one core motivation: belief in the mission.

However, when given a list of possible options and asked the reason(s) behind becoming a board member, **one in three respondents (34.0%) did not select “belief in the organization’s mission,”** and 19.1% did not select “belief in the organization’s mission” or “desire to further organization’s strategic direction.”

Instead, answers included **being asked to participate** by someone in the organization, **wanting to work with a specific person** on the board or within the organization, or **board service being an employment requirement**.

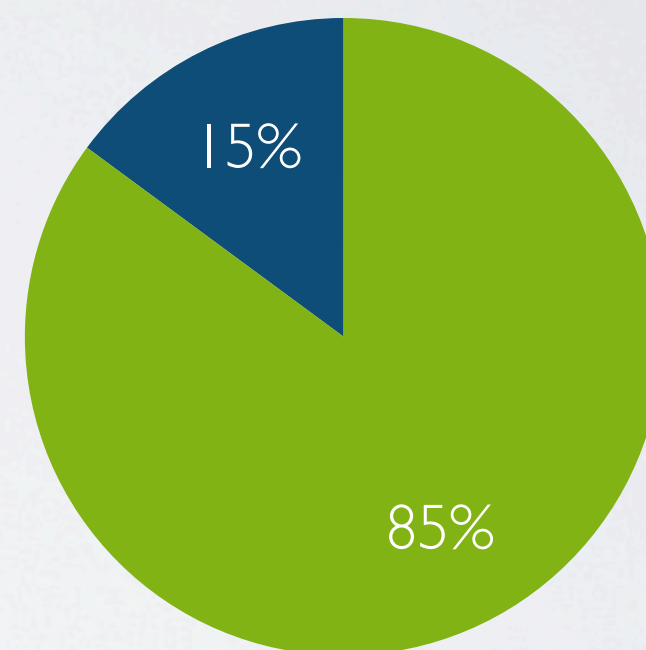
Comparing these initial reasons to board members' current motivations, conversion is minimal. **Twenty-eight percent still did not list belief in the mission as a motivating factor**, and more than one in ten board members (14.9%) are not serving the mission or strategic direction of the organization.

Reason(s) given for joining the board:



- Legitimate (i.e. mission or strategic direction)
- Illegitimate (i.e. non-mission centric factors)

Reason(s) given for staying on the board:



- Legitimate (i.e. mission or strategic direction)
- Illegitimate (i.e. non-mission centric factors)

HOW CAN YOU SPOT LOW ENGAGEMENT?

- **Low meeting attendance, poor punctuality and absenteeism.** If board members are frequently missing board and committee meetings, this is a red flag. It's often a sign that a board member is becoming less engaged.
- **High turnover.** If you're seeing new faces each passing year, it's going to be equally difficult to maintain consistency in strategic vision, organizational leadership or donor base. Stabilizing the board is the first step in building a strong foundation for your organization's future.
- **Low productivity.** One of the more subtle symptoms, low productivity can be seen in frequently missed deadlines, diminished fundraising success, dwindling volunteer and donor bases, and fewer new member referrals.

Image Credit: [markhillary](#)



In our survey, **36.4% of respondents had never recommended or personally recruited new board members.**

MYTHS & MISCONCEPTIONS

Before you can address low board engagement, board leaders need to understand the drivers behind board member complacency. These signals are difficult to interpret because they're often counterintuitive.

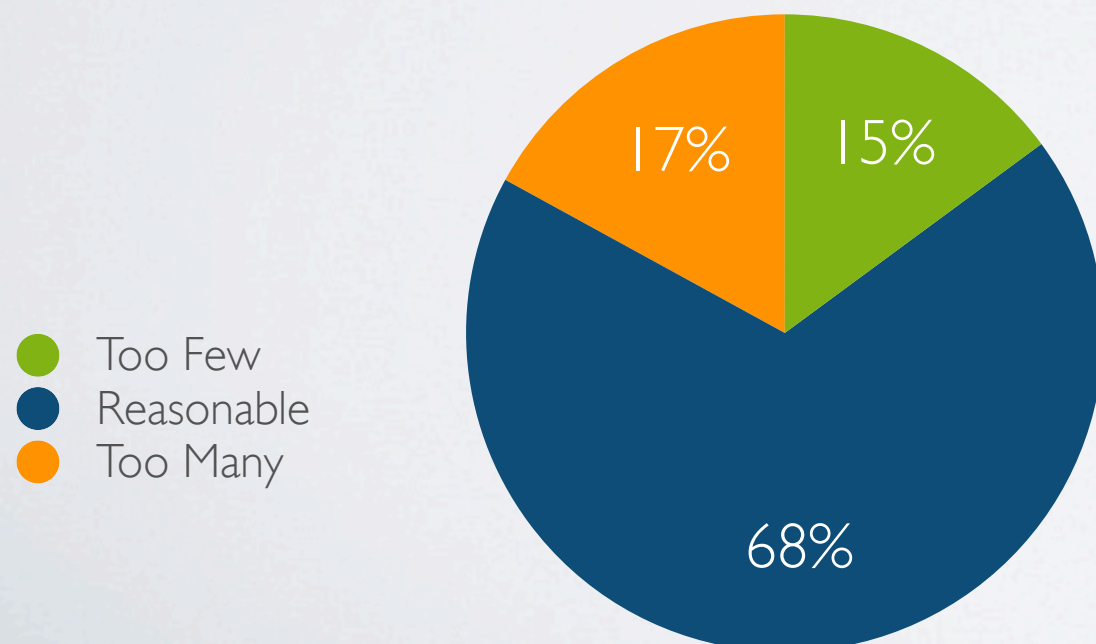
- **Myth #1:** I expect too much of my board already.
- **Myth #2:** Board members don't volunteer because they don't want to.
- **Myth #3:** I don't have high turnover, so my board members must be happy.

MYTH #1: I EXPECT TOO MUCH OF MY BOARD ALREADY.

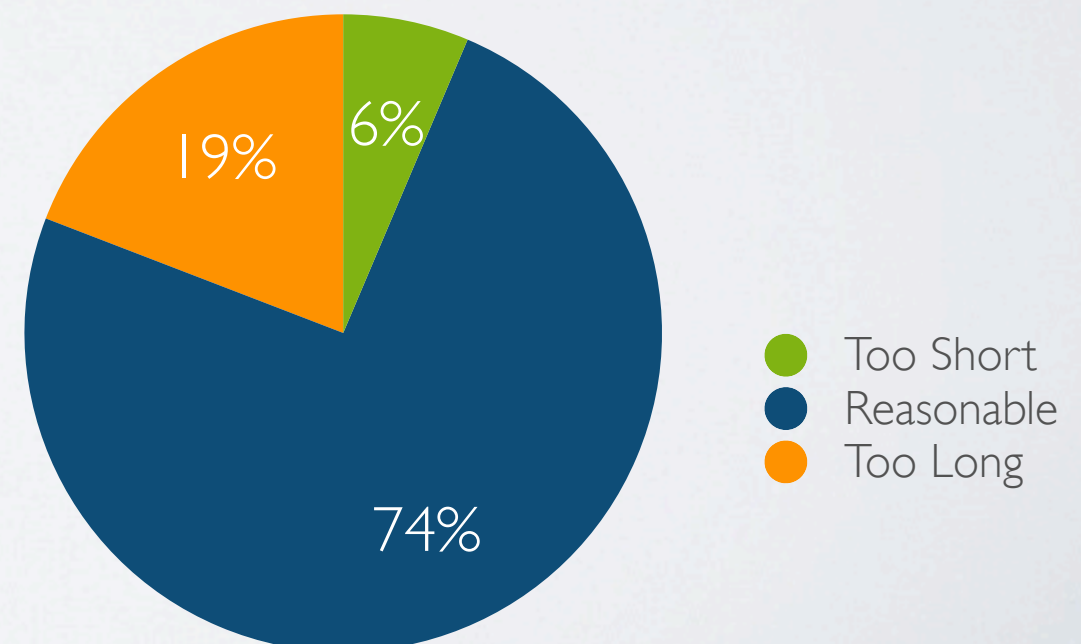
Contrary to human instinct, low board engagement is usually not because you're asking too much of board members, *but too little*.

More than 8 out of 10 board members think expectations are reasonable. The number of meetings board members are expected to attend seem “reasonable” to 68.1% and “too few” to 14.9%. The duration of board meetings seem “reasonable” to 74.5% and “too short” to 6.4%.

The number of meetings you are expected to attend:



In general, board meetings are:



MYTH #2: BOARD MEMBERS DON'T VOLUNTEER BECAUSE THEY DON'T WANT TO.

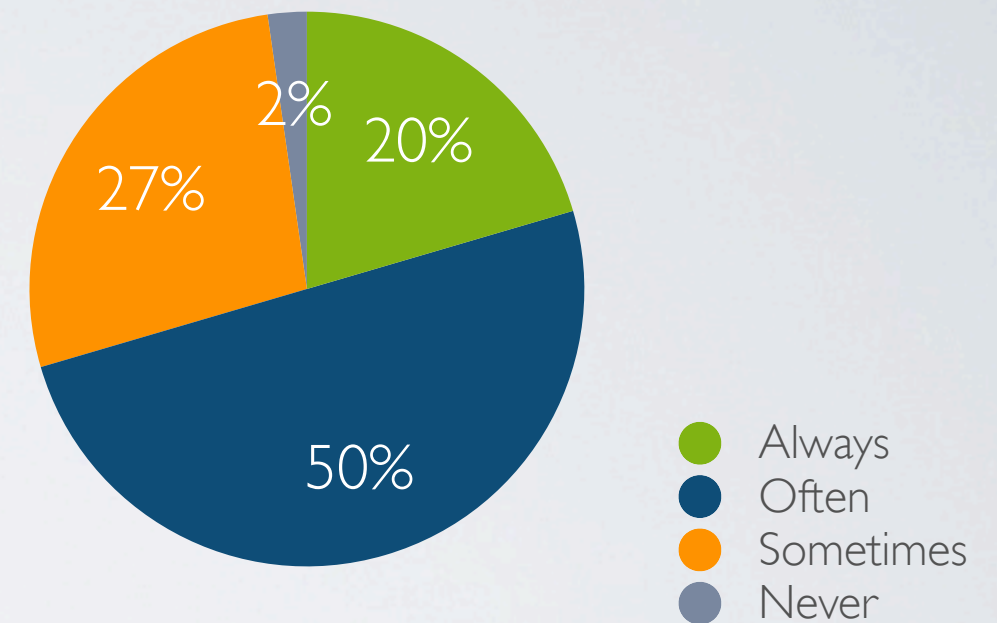
If board members are ambitious, proactive professionals, they would speak up if they had an idea—right? Wrong.

According to survey respondents, board members don't always know how to plug in to an organization, where or how to offer suggestions, how their skills might solve current organizational challenges, or how to track success.

When asked, **“Do you believe your skills/talents are being effectively used by the board and the organization?”** approximately 70% believed they were being used effectively “always” or “often.” The other 30% “sometimes” or “never” feel their talents are being used effectively.

Are you wasting 30% of available board talent? In order to maximize board impact and productivity, board leaders need to **tap into available talents and encourage board members to utilize their skill sets** for the betterment of the organization.

Do you believe your skills are being used effectively?

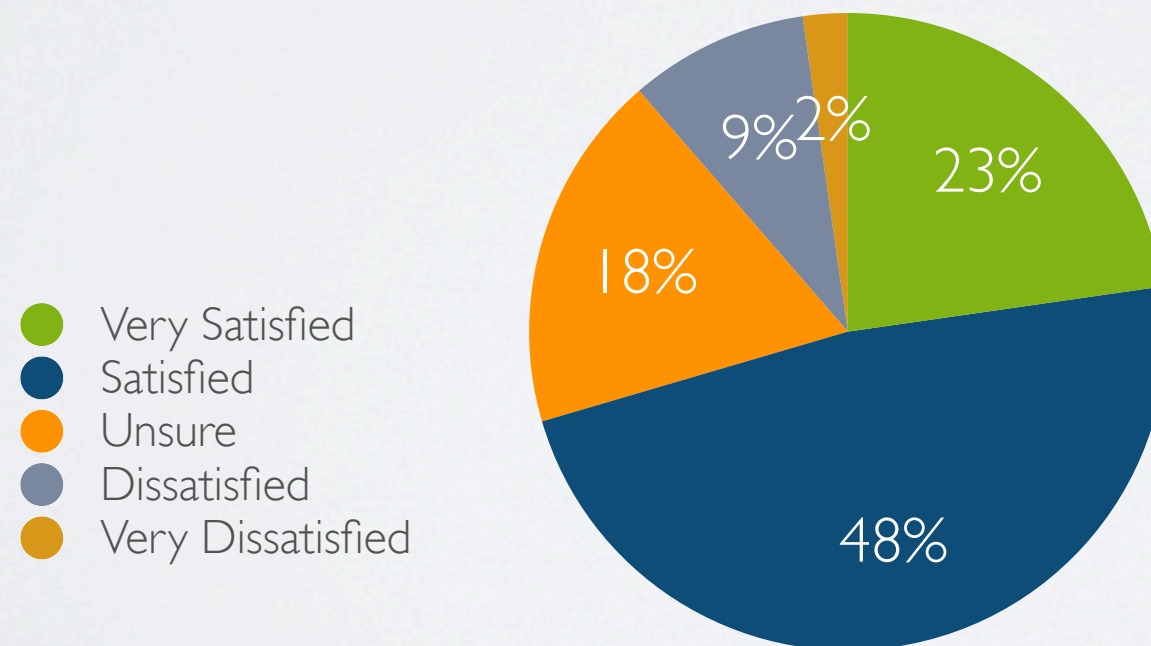


MYTH #3: I DON'T HAVE HIGH TURNOVER SO MY BOARD MEMBERS MUST BE HAPPY.

While 70% of respondents were “satisfied” or “very satisfied” with their contributions as board members, this still leaves **nearly 30% that were unsure or dissatisfied.**

Board members might stick around out of obligation, but if they aren't satisfied with their contributions, the **organization is missing out on their full potential.**

Are you satisfied with your contributions as a board member?



CAUSES

As addressed in the previous section, low board engagement often isn't a product of excessive expectations on the board leader's part or apathy on the board member's part. Instead, it's often one of the following:

- **Misalignment of mission:** Does everyone share the same goal?
- **Passively managed expectations:** Are objectives clear, acted upon and evolving?
- **Communication silos:** Is transparency expected and engagement easy?
- **Unplugged talent:** Is full potential being realized?

CAUSE #1: MISALIGNMENT OF MISSION

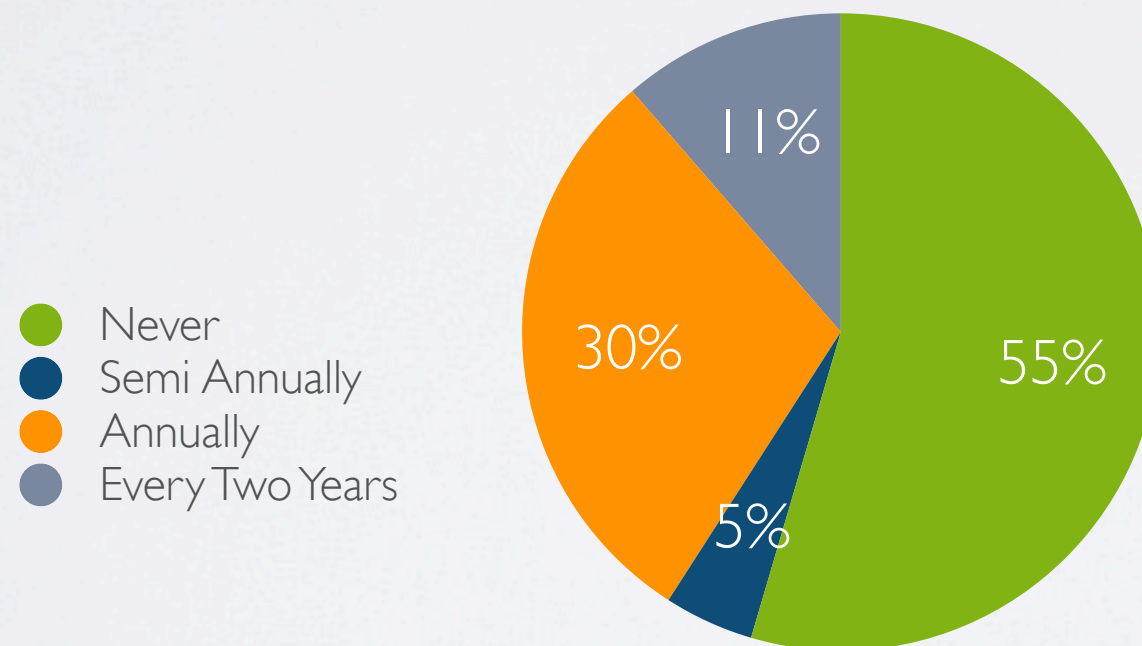
Board members engage with an organization for a variety of reasons, with those motivations often shifting over time. Ideally, regardless of why they originally joined—either because they were asked, board participation is an employment requirement, or they truly believed in the mission—over time, board members should become engaged and stay on the board because they believe in and want to further the mission. Unfortunately, too often this is not the case.

Sixty-six percent of respondents decided to serve for the mission and 73% of respondents continue to serve for the mission. Misalignment of mission is a central cause of low board engagement and a major concern because it undermines the fundamental purpose for the existence of the organization and the board. The question then comes, is it in the board's best interest to have members that aren't serving for the original goal and direction? Why aren't 100% of board members committed to the cause?

HOW DO YOU KNOW IF THEY CARE?

Conducting a self-assessment is a simple yet effective way of gauging board member engagement and their perceived effectiveness, but **most boards (54.5%) never assess whether their organization is achieving its mission.**

Does your board conduct a self-assessment?



CAUSE #2: PASSIVELY MANAGED EXPECTATIONS

As addressed in section 3, board members are more accepting of the expectations set for them than board leadership assumes, and **seek greater structure and invitations to engage.**

If board members don't feel engaged, heard and effective, the problem may be that board leadership is passively managing expectations. **Expectations are rarely addressed and not actively agreed upon, evaluated and evolved by board members.**



WHAT ARE THE PERCEIVED RESPONSIBILITIES OF BOARD MEMBERS?

Survey respondents were asked to rank **what they consider to be their top board/committee responsibilities** as well as **what they think the organization considers to be top board/committee responsibilities** (1 being the most important; 9 being the least important; listed in order by average rank).

Board Members' Top Priorities	Boards' Perception of Organizations' Top Priorities
Help shape strategic direction (2.13)	Help shape strategic direction (2.60)
Fundraise and obtain sponsors (3.71)	Fundraise and obtain sponsors (3.58)
Provide financial oversight (3.73)	Provide specific skills/services (4.28)
Provide specific skills/services (4.78)	Provide financial oversight (4.36)
Evaluate the CEO (5.02)	Serve as a sounding board (4.76)
Serve as a sounding board (5.59)	Make personal contributions (5.76)
Make personal contributions (6.26)	Evaluate the CEO (6.00)
Community relations (6.32)	Educate the public (6.39)
Educate the public (6.76)	Community relations (6.60)

Because board members ranked both lists of perceived responsibilities, **this makes discrepancies even more telling**. It suggests that board members are aware of differences in priorities, but **fail to communicate** this or **attempt to realign expectations** with the organization.

The less consensus there is between board members' priorities, the organization's priorities and board members' perceived expectations, the more likely board members will feel **confused, frustrated and, eventually, less engaged**.

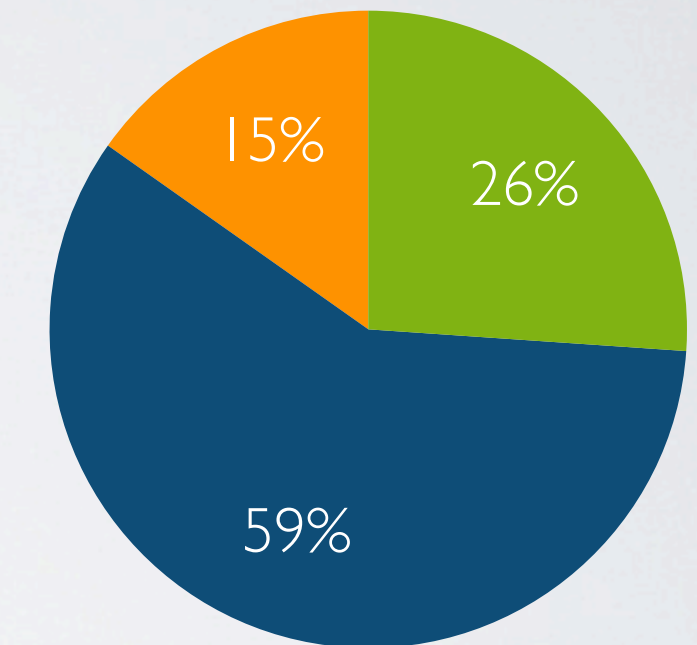
TURNING IDEAS INTO ACTION

Equally discouraging as miscommunicated expectations is a lack of reinforcement or response.

- 59% don't believe there are good processes in place for collecting, implementing and evaluating the effectiveness of board and committee suggestions.
- 13% feel the organization welcomes and makes an effort to implement suggestions from board and committee members "every time." This leaves **87% that are failing, on some level, to evaluate and act on suggestions.**

It's important to establish a proper foundation for feedback, not just operationally, but also opportunistically.

Are processes in place to collect, implement and evaluate board effectiveness and suggestions?



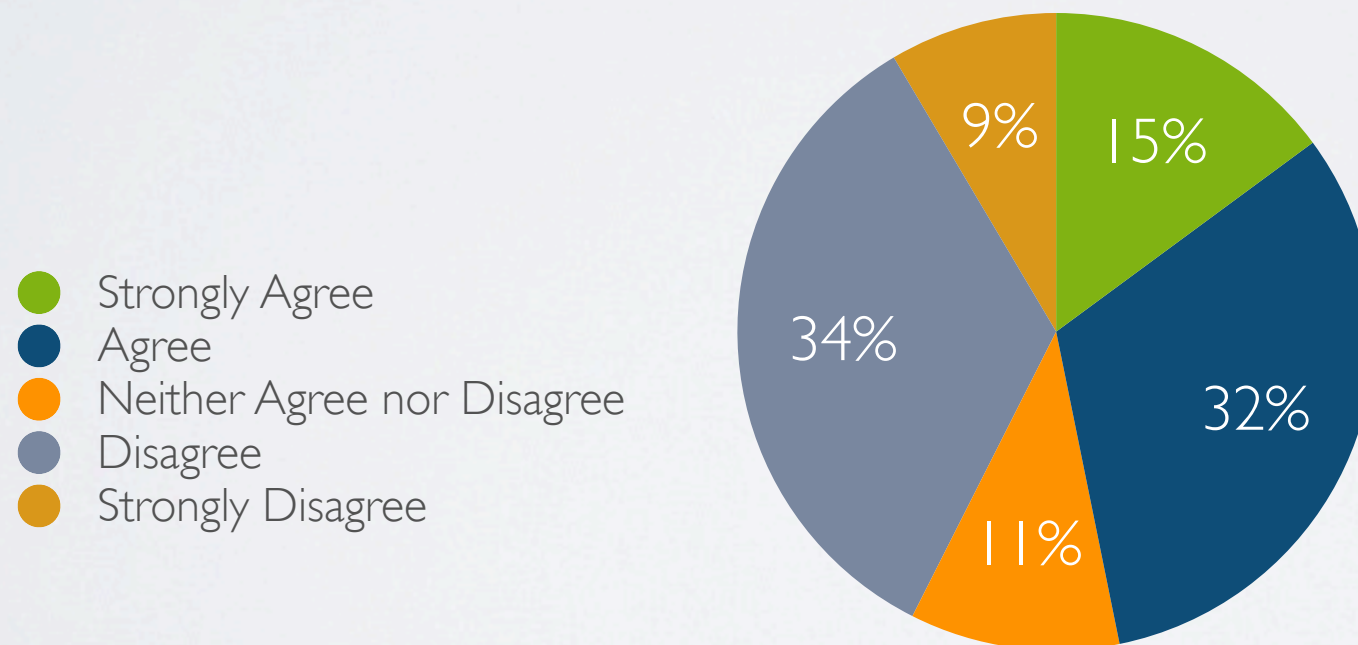
“THE INFLUENCE GIVEN TO OTHER BOARD MEMBERS IN DETERMINING THE AGENDA AT BOARD MEETINGS WAS POSITIVELY ASSOCIATED WITH GREATER ACTIVITY IN EVERY BOARD ROLE.”

- [URBAN INSTITUTE NATIONAL SURVEY OF NONPROFIT GOVERNANCE](#)

CAUSE #3: COMMUNICATION SILOS

Less than half of respondents (46.8%) agree that board resources are **accessible, logically organized and easy to use**. While 61.7% believe that meetings are **focused, productive and closely follow the agenda**, 38.3% disagree. Nearly half (46.8%) feel that information and materials necessary for board/committee meetings **aren't delivered in a timely manner**.

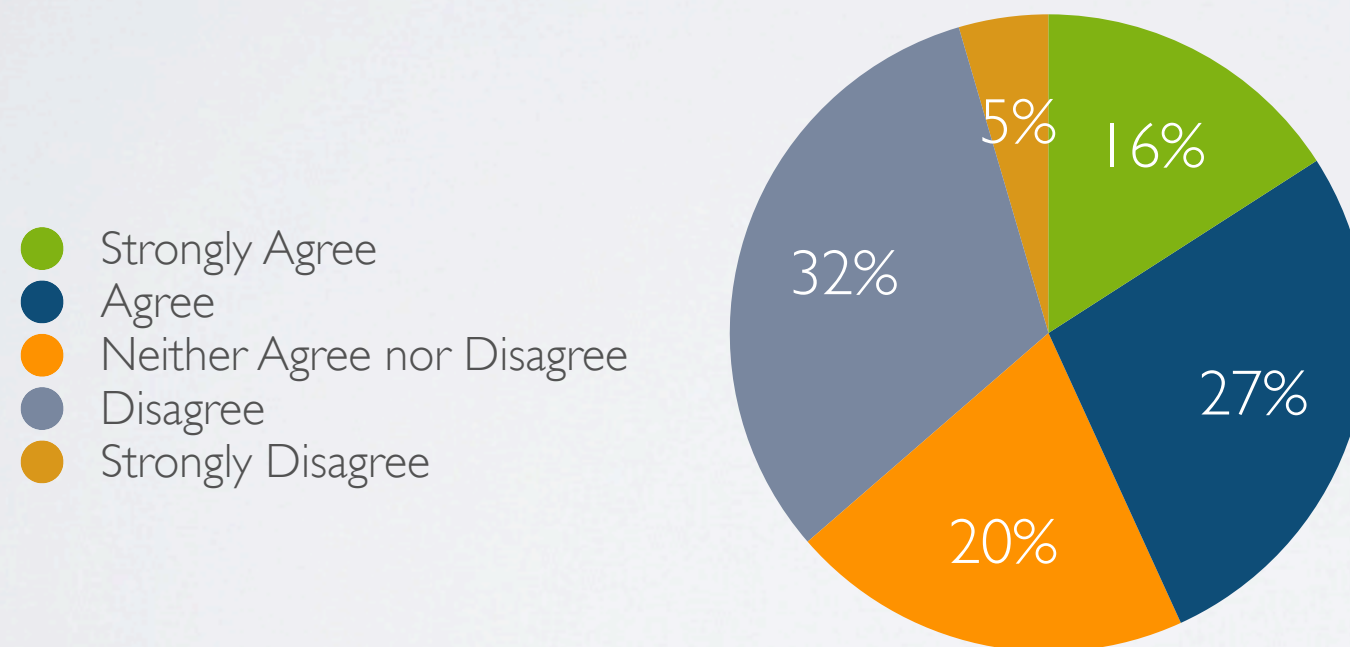
General information, archived meeting materials, organizational data and other resources are accessible, logically organized and easy to use.



MAXIMUM EFFECTIVENESS

More than half of board members (56.8%) do not feel that their board is currently structured for maximum effectiveness.

Please state the degree to which you agree with this statement: "Our board is currently structured in a way that allows for maximum effectiveness."



CAUSE #4: UNPLUGGED TALENT

One of the primary purposes for establishing a board of directors is to solicit a variety of perspectives and insights, by bringing together a diverse group of professionals with varying backgrounds and skill sets. **In an ideal organization, the mission would benefit from the board members' skills, knowledge and networks being leveraged to their full potential.** However, survey results demonstrated a different reality.

Thirty percent don't believe the board and the organization are fully and effectively using their skills and talents. The same percentage is unsure of, or dissatisfied by, their contributions.



Image Credit: [Samuel M Livingston](#)

FUTURE-PROOFING YOUR BOARD

Low board engagement threatens the sustainability of the organization and viability of the mission. In order to future-proof your board, you need to **better engage today's board, effectively recruit tomorrow's board and leverage technology for maximum impact.**

ENGAGING TODAY'S BOARD

The causes of low board engagement must be addressed using **both top-down and bottom-up approaches**; through **clearly defined vision, structure and expectations** as well as **transparency, invitations to engage and empowerment**.

- **Realign mission:** Conduct bi-annual self-assessments to evaluate board effectiveness, morale and alignment with the mission. Have a high-level discussion of the results with board members.
- **Actively manage expectations:** Make sure board and committee expectations are clearly articulated to all members. Track individual contributions and progress so members know if they are meeting expectations and how they can improve. Make them feel like they are critical to the organization's success, and hold them accountable.
- **Break down communication silos:** Make resources, meeting information, minutes and motions easily accessible. Encourage transparency.
- **Plug in talent:** Document each board member's background, education, skills and connections. Invite them to participate when you see relevant opportunities.

RECRUITING TOMORROW'S BOARD

Part of avoiding *misalignment of mission, passively managed expectations, communication silos* and *unplugged talent* is recruiting the right individuals to become the future leaders of your board.

- **Gauge passion:** Certain factors in low board engagement can be easily rectified with better processes and tools; misalignment of mission is not one of them. If one in four current board members are not serving the board for the sake of the mission, be wary of recruiting new members that feel a sense of personal obligation or other motivating factors outside of the mission.
- **Be honest about the commitment:** It can be tempting to downplay the level of commitment necessary and expected in order to gain new board members, but it's more important to be honest. Address board attendance, committee leadership, fundraising and personal contribution expectations.

RECRUITING TOMORROW'S BOARD

- **Assess skill sets:** Get to know prospective board members and think creatively about how they can fit organizational needs. [They don't all have to be fundraisers](#); a lot of skills and personalities can contribute to development opportunities and organizational goals.
- **Quality attracts quality:** Encourage your most engaged board members to refer potential candidates.
- **Plug in talent:** Make a good first impression by assigning a mentor and providing an orientation packet. Try to schedule an on-site visit within the first month so new members can see the mission in action.



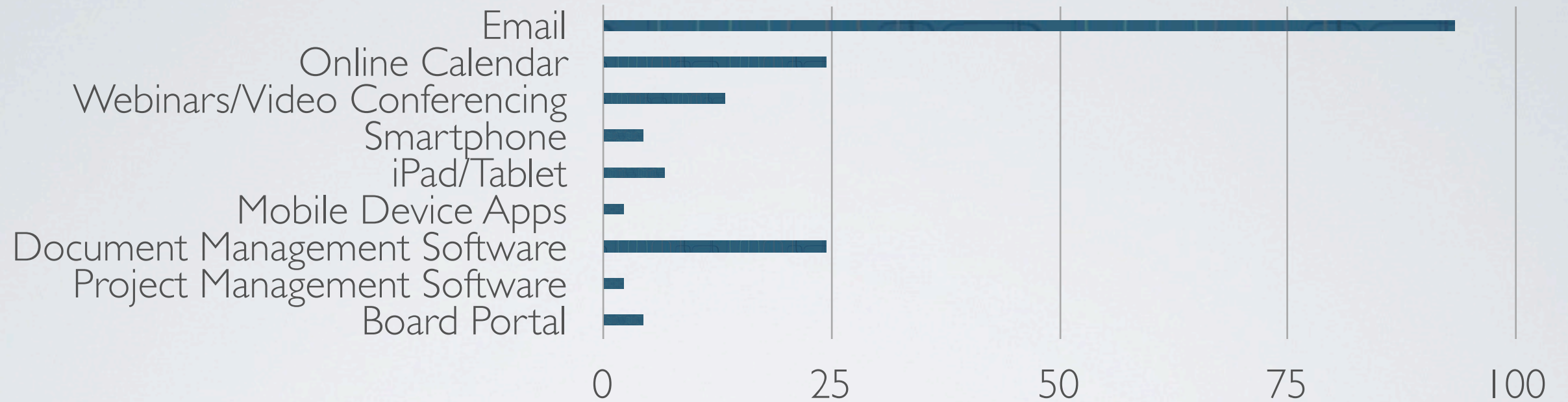
Image Credit: [morgantis](#)

LEVERAGING TECHNOLOGY FOR MAXIMUM IMPACT

In addition to the causes of low board engagement explained in section 4, another shift in human behavior will soon separate effective boards from ineffective ones: As information sharing and communication behaviors become increasingly integrated with technology, board members of the present and future are going to hold these same expectations in the boardroom.

Board leadership can leverage technology to better engage board members while paving the way for future member recruitment.

What technologies does your organization use? (shown by %)



What technologies should your organization consider? (shown by %)



Today, email is by far the most commonly utilized form of technology for board communication (93.3%). However, most respondents indicated that other forms of technology could be implemented, with the most popular being **document management software** (ex. Google Drive, Dropbox) (44.4%), **online calendar** (40.0%), **webinars/video conferencing** (35.6%), **board portal or other board management software** (24.4%), and **email** (24.4%).

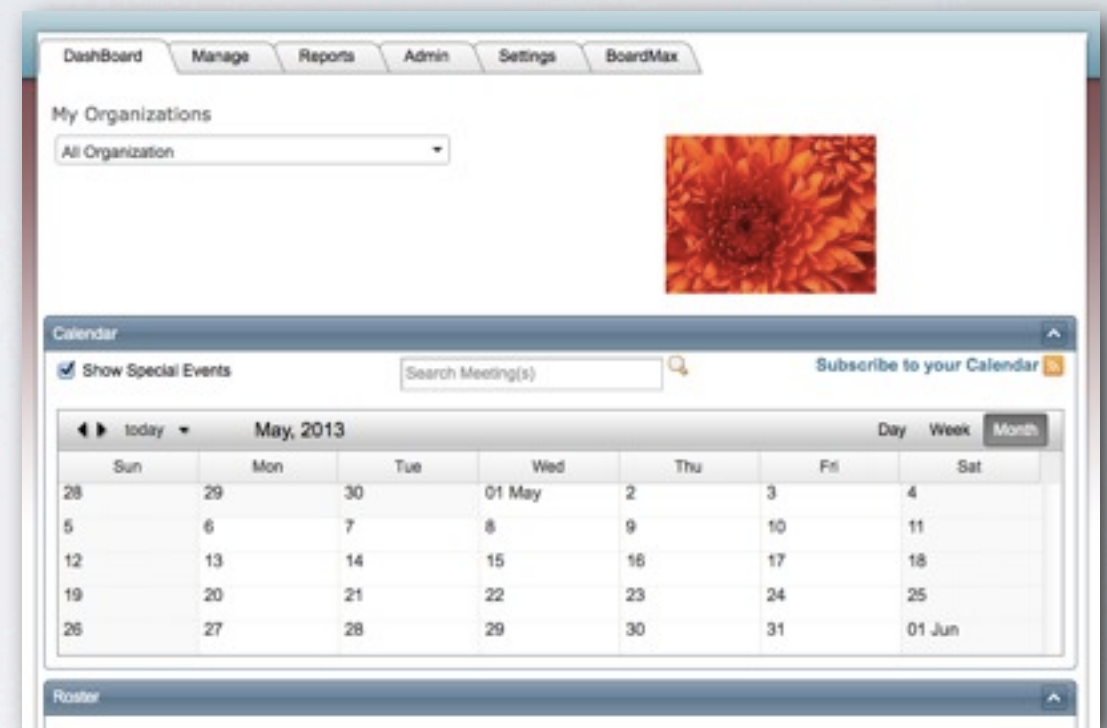
BENEFITS OF A BOARD PORTAL

The value of a board portal is its ability to incorporate and integrate the features of email, online calendars and document management software into one comprehensive system. A board portal can also increase board engagement through collaboration and interactive tools.

- **Manage board and committee meetings.** Use a shared online calendar for board and committee meetings. Schedule email reminders. Post interactive marketing agendas and online board packets.
- **Centralize communications.** Make resources easily accessible to all members. Assign tasks, post-meeting minutes and motions.
- **Make engagement easy.** Create ballots and polls to encourage interaction and solicit feedback.
- **Match skills to needs.** Keep a detailed member profile with background, skills and connections, with designated levels of access for sensitive information.

BENEFITS OF A BOARD PORTAL

- **Implement suggestions.** Link strategic suggestions to committee and board meetings to track and show progress.
- **Track board performance and responsibilities.** Measure member involvement using report cards, meeting RSVPs and attendance within the board portal, and have more educated conversations with members.
- **Drive good governance.** Foster transparency, manage and track board member terms, and house detailed profile information.
- **Help ensure regulatory compliance.** Track board demographics and comply with IRS regulations by managing 990s, conflict of interest policies and procedures, and independent director requirements.



ADOPTING A BOARD PORTAL

Easy to implement

- Requires no additional technology infrastructure or additional IT resources.
- Delivers a secure, fully hosted web-based solution.
- Includes all ongoing product upgrades.

Easy to adopt

- Offers a simple, intuitive interface.
- Provides all the tools board members need in one place.

Learn more about StreamLink Software's board portal [BoardMax](#):

Schedule a Demo



ABOUT STREAMLINK SOFTWARE



[StreamLink Software](#) offers grant and board management platforms that connect disparate systems and processes creating dynamic ecosystems that drive performance and compliance. StreamLink Software's products, [AmpliFund](#) and [BoardMax](#), enable nonprofit and public sector institutions to systemize complex tasks, secure additional revenue, and increase efficiency to better serve their communities.

AmpliFund and BoardMax provide accurate, immediate, and accessible reporting to ensure public trust and protect the reputation of the organization to the board and other stakeholders. Founded in 2008, StreamLink Software helps solve different management challenges including board member and leadership volunteer management.

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