

The 2015 Board Engagement Report

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Executive Summary

A primary objective of this annual survey is to pinpoint the factors that have the strongest influence on board member satisfaction. More specifically, we wonder: Are there aspects of board management that the organization can control, which can positively impact board member satisfaction, engagement and longevity? Year after year, we find that the answer is “yes.”

Well-run meetings, access to resources, a voice in the organization and a unique role to play all contribute to happy, effective and loyal board members.

The growing adoption of board portals equips organizations with a centralized suite of tools to manage members, documents, meetings, and most of all, board efficacy. What we continue to find is that board management can be the difference between success and failure.

We hope our findings help you take measurable steps to improve member satisfaction and board effectiveness. Thank you to those who participated in our survey.

Sincerely,



A handwritten signature in black ink, appearing to read 'Adam Roth' in a cursive script.

Adam Roth

Founder & CEO, StreamLink Software



Introduction

StreamLink Software solicited a survey about board management and engagement, and invited board members, administrators and executives to respond. We found that sound board management leads to more engaged and effective boards. This report frames the issues nonprofit and board leaders must face to improve board satisfaction and fully leverage the board's potential in their organizations.



Methodology

StreamLink Software conducted a nationwide survey to better understand the expectations, engagement level and challenges of active board members.

The survey consisted of 23 questions collected via SurveyMonkey in August 2015. Responses were solicited through the StreamLink Software website, social media and email. A total of 296 board members, executives and board administrators responded to the survey.

Responses are compared to the 2014 survey conducted by StreamLink Software, published in September 2014. Download [The 2014 Board Engagement Report](#) to view the report in its entirety.

Section 1 | The State of Boards

Board members influence leadership decisions and strategic direction. They champion compliance and good governance. In many organizations, they are essential to fundraising and development, community relations and board recruitment. In short, a board has the potential to be an incomparable asset, or a tremendous drain, on the organization it serves. But what's really going on in America's boardrooms?

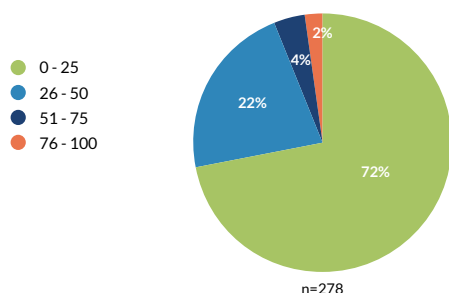
We asked, and here's what board members, administrators and executives said.

Size

The number of board member seats determines the amount of talent, diversity and unique perspectives that can be represented at the table. It also impacts the board's agility, fundraising power and presence in the community.

According to survey results, the vast majority (72%) of organizations ($n=278$) have 25 board members or fewer, down from 77% last year ($n=198$). Twenty-two percent have 26 – 50 board members, up from 17%. This means that while boards are slightly larger than last year, smaller boards still prevail.

How many people serve on your nonprofit board?

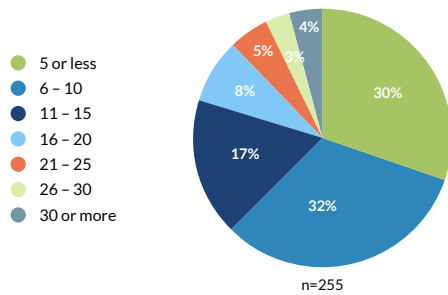


Meetings

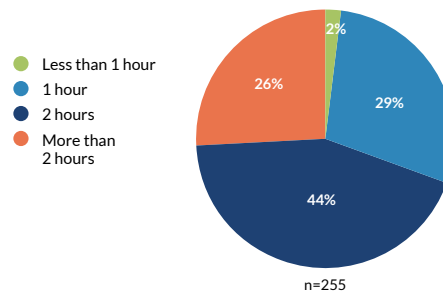
For many, meetings are the core of board participation. Board and committee meetings are essential to host strategic discussions, facilitate voting, build relationships with fellow members, and reconnect with the organizational mission. For these reasons, attendance is often a critical board member responsibility.

Thirty-two percent of board members ($n=255$) are expected to attend 6 – 10 board and committee meetings annually—the most popular response. Second was five or fewer meetings, cited by 30% of respondents, followed by 11 – 15 meetings (17%).

During a 12-month period, how many board and committee meetings were you expected to attend?

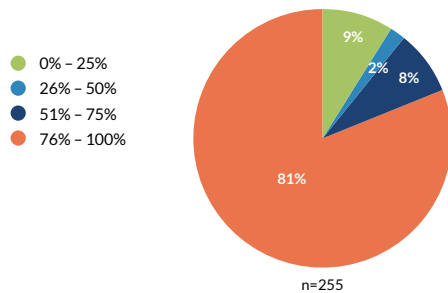


How long are your organization's average board/committee meetings?



The typical board meeting lasts two hours, cited by 44% of respondents ($n=255$). However, boards are meeting slightly longer than before: The percentage of boards meeting for more than two hours increased from 18% ($n=198$) to 26%.

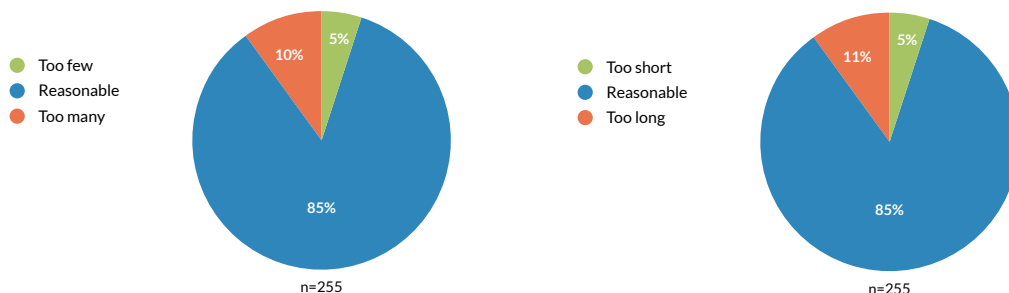
During a 12-month period, what percentage of board and committee meetings did you attend?



Overall, board attendance is high. More than three-fourths (81%) of board members ($n=255$) attended 76% - 100% of board and committee meetings over the past 12 months. However, the second most cited response (9% of respondents) was 0% - 25%.

Further, board members generally agree with the expectations set for them. Most (85%) believe the number of meetings they are expected to attend seems reasonable ($n=255$) (down slightly from 86%, $n=198$). One in ten believe their board meets too frequently (up from 8%), and only 5% believe they don't meet enough (down from 6%).

The number of meetings you are expected to attend seems:



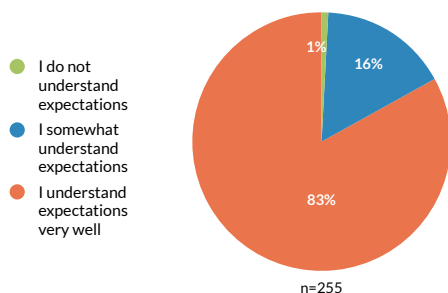
Regardless of meeting length, board meetings must be organized and well run to be effective and keep board members engaged in the organization. Fortunately, the majority of board members agree that their meetings are well run. Ninety percent ($n=249$) (down from 91%, $n=198$) believe that the majority of meetings are focused, productive and adhere to an agenda.

Expectations

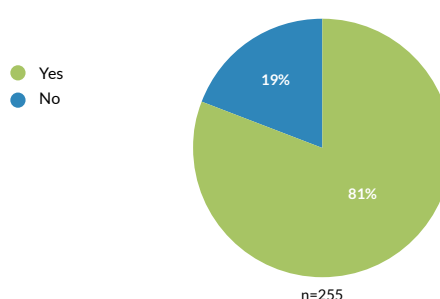
New members enter into a contract with the organization they serve. They volunteer their time and expertise, and often agree to set expectations around attendance, participation and financial investment. Clearly outlining, communicating and reinforcing these expectations regularly has been shown to increase individual member performance and engagement.

Fortunately, board members are increasingly confident that they understand the expectations set for them. Eighty-three percent understand expectations very well, and 16% somewhat understand expectations ($n=255$). Comparatively, 74% clearly understood expectations last year ($n=198$), and 25% somewhat understood expectations.

How well do you understand board member expectations?



Are board expectations and role responsibilities clearly defined by the organization you serve?



However, board members are less likely to agree that these expectations are clearly outlined. Eighty-one percent of respondents ($n=255$) agree that the organization clearly defines expectations and role responsibilities, down from 84% in 2014 ($n=198$). Board leadership should convey expectations to members, as well as document them so they can be referred to as needed.

Materials

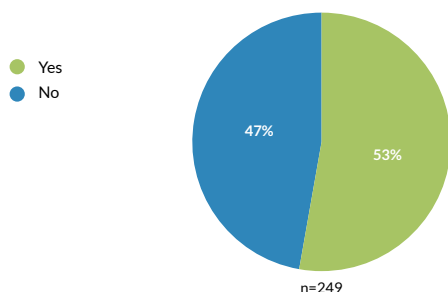
In preparation for meetings, organizations typically distribute board packets with the meeting agenda, voting items, financial and other organizational reports, and supporting materials. Compiling and disseminating board packets is often a cumbersome and time-consuming task, but an essential one. Timely receipt of these materials enables board members to walk into meetings fully prepared to have an informed, efficient discussion on agenda items.

Eighty-eight percent of respondents ($n=249$) say that meeting materials are usually delivered in a timely manner, up slightly from 87% last year ($n=198$). Most (74%) of respondents ($n=249$) agree that archived meeting minutes, organizational data and other resources are accessible to board members, logically organized and easy to use. This is down from last year (90%, $n=198$).

Communication

When asked “Does your organization make it easy for board members to communicate with one another?” 84% agreed ($n=249$). That said, boards have not improved their ability to solicit member feedback. Only 64% of respondents ($n=249$) agree that their board has processes in place to collect, evaluate and implement board and committee suggestions, and this is down from 67% last year ($n=198$).

Does your organization use a board portal or other board management software?



A board portal or board management software is one tool used by organizations to facilitate communication. **Board portal adoption has increased significantly over the past year. More than half (53%) of respondents ($n=249$) use a board portal or other board management software, up from 36% just last year ($n=198$).**

(Disclaimer: The majority of survey responses were solicited via the StreamLink Software network. Responses may be skewed in favor of board portal users.)

Skills and Talents

Most boards strive to be well balanced and to include diverse skill sets and backgrounds. However, the most effective boards go a step further, and tap into the unique skills and talents of their members.

Fortunately, boards are utilizing their members better than before. The percentage of respondents that believe their skills and talents are being effectively used by the organization increased from 78% ($n=198$) to 83% ($n=229$).

Strategic Influence

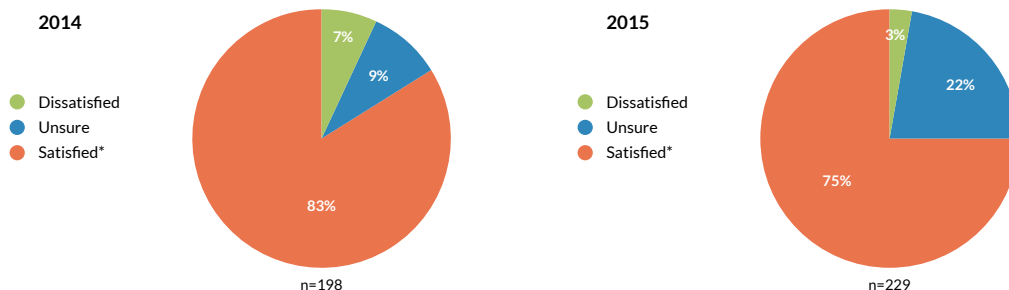
Boards' perceived influence has increased year over year. Eighty-seven percent of respondents believe their board has a major or moderate impact on the organization's strategic direction ($n=229$), up from 82% ($n=198$). **Unfortunately, more than one in ten still believe the board has little-to-no impact:** 13% said the board's impact was minor, neutral or none.

Additionally, recruitment has plummeted. In 2014, 68% of respondents ($n=198$) had recommended or personally recruited board members. That percentage is now 46% ($n=229$).

Satisfaction

Board members' satisfaction with their contributions to the organization is often closely tied to their engagement, attendance and performance. When satisfaction levels drop, these often follow suit. Year over year, board member **satisfaction (satisfied or very satisfied) decreased from 83% to 75%.**

Are you satisfied with your contributions as a board member?



* Selected "satisfied" or "very satisfied."

Section 2 | The Keys to Board Satisfaction

Individuals join boards for a variety of reasons: Professional development, commitment to a cause, networking and others. But the reasons that they stay are largely the same.

When comparing the commonalities between satisfied and dissatisfied board members, many aspects of board management came into play. Below, we outline how meetings, document management, expectation-setting, communication, feedback and perceived influence all play a role in board engagement.

Note: For the purposes of this report, satisfied board members are those that responded as being “satisfied” or “very satisfied” with their contributions.

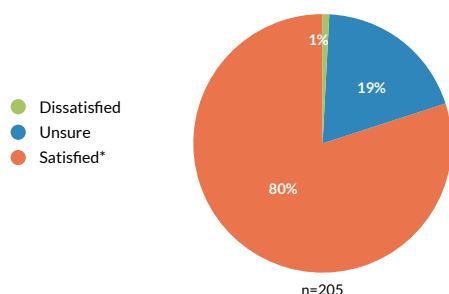
Meetings

Dissatisfied board members are more likely than satisfied ones to believe attendance expectations are unreasonable. Only 8% of satisfied board members believe they are expected to attend too many meetings ($n=171$). By comparison, 17% of dissatisfied members ($n=58$) think the board meets too frequently. The correlation makes sense, given that dissatisfied board members are likely already frustrated with their commitment to the organization.

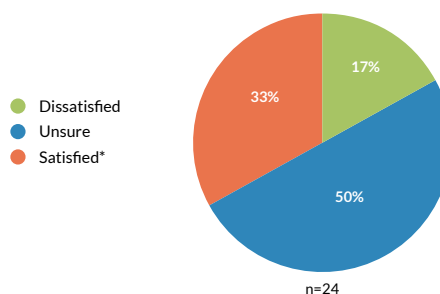
When comparing attendance and satisfaction, approximately half of respondents cited being satisfied when they attended 75% or less of board or committee meetings ($n=43$). When respondents attended more than 75% of meetings ($n=186$), 80% were satisfied. The two factors are likely intertwined: Meeting participation likely helps members feel involved in the organizational mission, while low attendance is a symptom of waning engagement.

A focused and productive meeting is highly correlated to board satisfaction. When meetings are focused, productive and adhere to an agenda ($n=205$), 80% of members are satisfied. When they're not ($n=24$), satisfaction plummets to 33%.

The majority of meetings *are* focused, productive and adhered to an agenda



The majority of meetings *are not* focused, productive and adhered to an agenda



* Selected “satisfied” or “very satisfied.”

Expectations

There is a correlation between expectation-setting and satisfaction. When board members “somewhat” understand expectations ($n=36$), half are satisfied with their contributions. When members understand expectations “very well,” ($n=192$) this percentage increases to 80%. Well-articulated expectations create a kind of contract between board members and the organization. They lay the foundation for the commitment, and give members a clear path to success.

Similarly, member responsibilities must be clear. When board expectations and role responsibilities are not defined ($n=40$), 50% are satisfied, compared to 80% when they are ($n=189$). The simplest way to clearly define and communicate expectations are to document and post them in a universally accessible location, so members can reference them at any time.

Materials

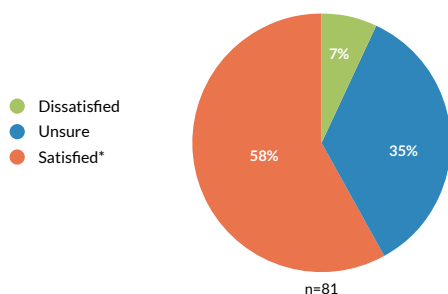
Distributing board packets can be a tedious administrative chore. However, delivering meeting materials in a timely manner increases board member satisfaction from 53% ($n=30$) to 78% ($n=199$). With this information at hand, board members can attend meetings prepared and ready to engage in discussion.

Relatedly, when archived meeting minutes, organizational data and other resources are accessible to board members, logically organized and easy to use, board member satisfaction increases from 53% ($n=59$) to 82% ($n=170$). This allows members to be actively engaged in the organization whenever and wherever, instead of limiting interactions to the boardroom.

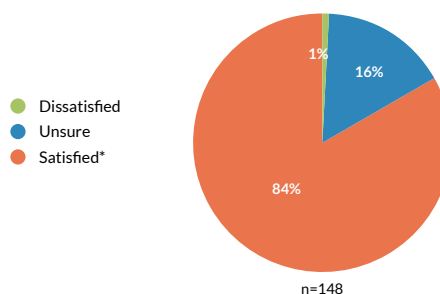
Communication

More than one-third of respondents cite that their board lacks processes to collect, evaluate and implement board and committee suggestions (36%) ($n=249$). Unfortunately, this practice is also strongly correlated to negative member satisfaction. Established feedback loops increases member satisfaction from 58% ($n=81$) to 84% ($n=148$).

No processes in place to collect, evaluate and implement board and committee suggestions



Processes in place to collect, evaluate and implement board and committee suggestions



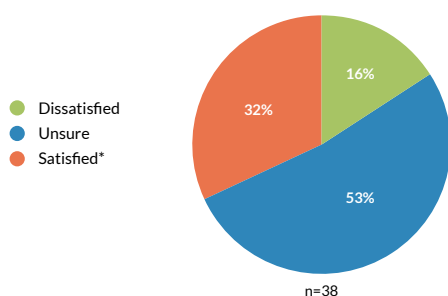
* Selected “satisfied” or “very satisfied.”

Board members want their voice to be heard within the organization, and appreciate when given the opportunity to communicate with board leadership and fellow members. When an organization makes it easy for board members to communicate ($n=191$), 80% of board members are satisfied. Only 47% of members are satisfied when they do not ($n=38$).

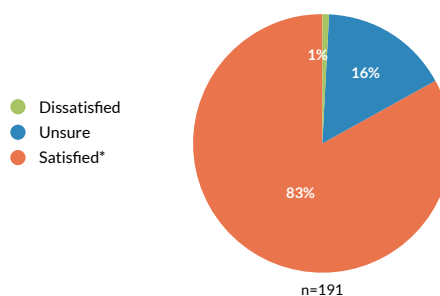
Skills and Talents

Talent is one of the strongest influencers on board member satisfaction. When respondents did not believe their skills and talents were being effectively used by the organization ($n=38$), only 32% were satisfied with their contributions. When they are effectively utilized ($n=191$), 83% of respondents were satisfied. Board leadership should maintain records of all active members' backgrounds, skills and affiliations. This information can better inform board responsibilities and committee participation, and set members up for success.

Don't believe skills and talents are being effectively used by the organization



Believe skills and talents are being effectively used by the organization



* Selected "satisfied" or "very satisfied."

Strategic Influence

When asked "What impact do you feel the board has on the organization's strategic direction?" 78% of respondents that cited major or moderate impact ($n=199$) also indicated that they were satisfied with their contributions. Comparatively, when respondents felt they have little-to-no impact (neutral, minor or none) ($n=30$), only half were satisfied.

If a board member has personally recruited or recommended members to their board ($n=105$), 85% report being satisfied. Comparatively, 66% of those who haven't are satisfied ($n=124$).

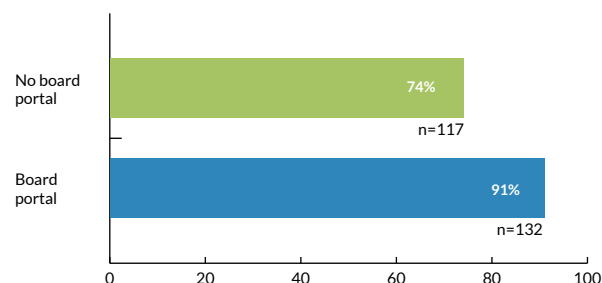
Section 3 | The Impact of Board Portals

Having a board portal is correlated to more clear expectations and responsibilities, higher attendance, better access to meeting materials and resources, utilized member talent and open communication.

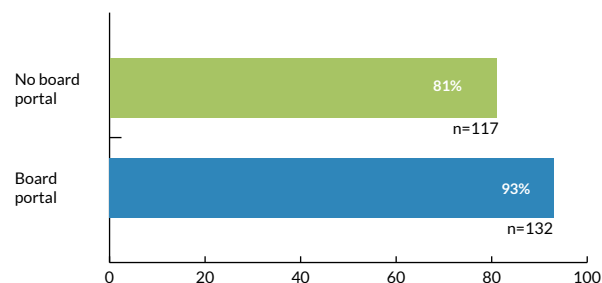
Most board portals include document management. As a result, the organizations can more easily house and share important documents, including archived meeting minutes, organizational data, board documents and member expectations, in a centralized location. Documents can be made universally accessible from any location or device, or shared with a select group based on user permissions.

Relatedly, board packets do not have to be arduously compiled, organized, printed and mailed to members in advance of the meeting. Digitized documents can be aggregated and disseminated electronically. This saves time and money, and gets files in board members' hands sooner.

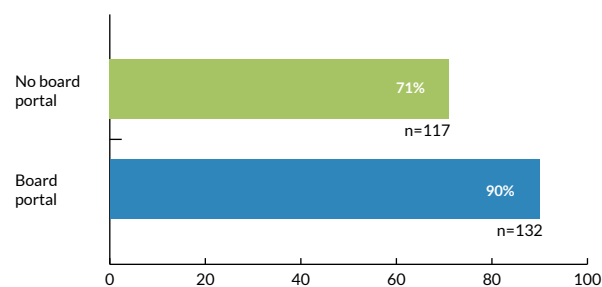
I understand expectations very well.



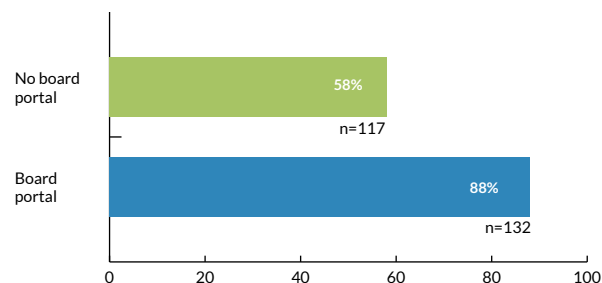
Meeting materials are delivered in a timely manner.



Board expectations and role responsibilities are clearly defined.



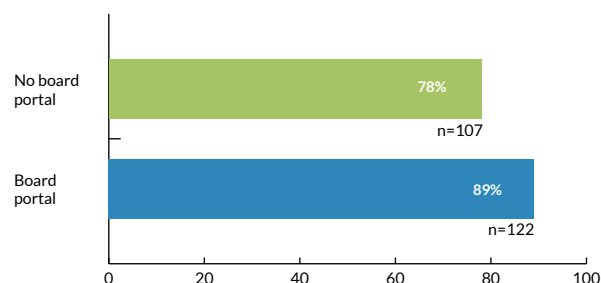
Archived meeting minutes, organizational data and other resources are accessible to board members, logically organized and easy to use.



Eighty-nine percent of board portal users believe member skills and talents are being effectively used by the organization, compared to 78% of non-users. Software with member profiles makes it easy to track members' backgrounds, affiliations and skillsets. This information can help board leadership better align responsibilities and committee participation with member talents and interests, which can result in greater satisfaction and increased board efficacy.

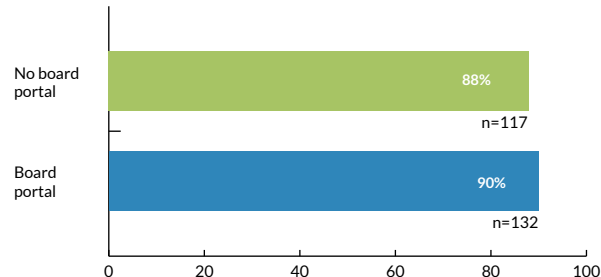
User profiles can also manage demographic information and conflicts of interest for compliance and governance purposes.

Board member skills and talents are being effectively used by the organization.



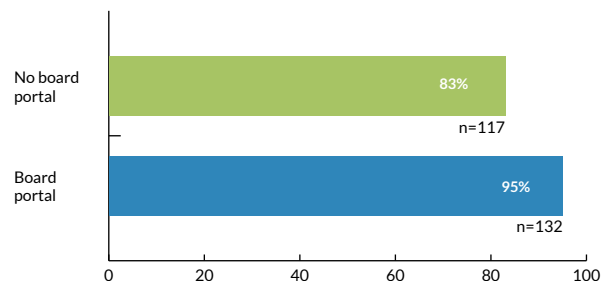
Board portal users were slightly more likely to attend more than half of board meetings (90% vs. 88%). Calendar and scheduling features simplify board meeting management. Board and committee meetings can be scheduled in a few clicks. Automated emails can prompt members that haven't RSVPed, and remind members a couple days before the meeting. Each member's RSVP and actual attendance record are tied back to their user profile, so attendance can be recorded for performance evaluations.

Attended more than half of board meetings over the past 12 months.

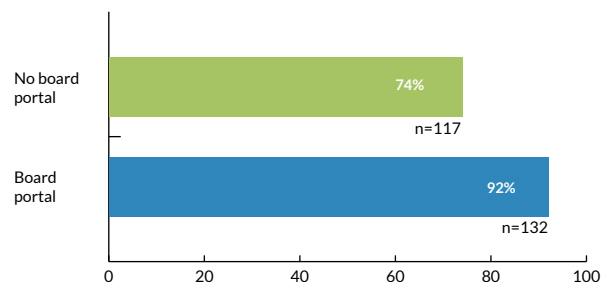


Software users were also more likely to agree that meetings are focused and productive, and that board members can easily communicate. Centralized document management, ballots and polls make it easier to solicit member opinions and move agenda items forward. By giving members real-time access to organizational data and board resources, they can stay engaged in and out of the boardroom.

The majority of meetings are focused, productive and adhered to an agenda.

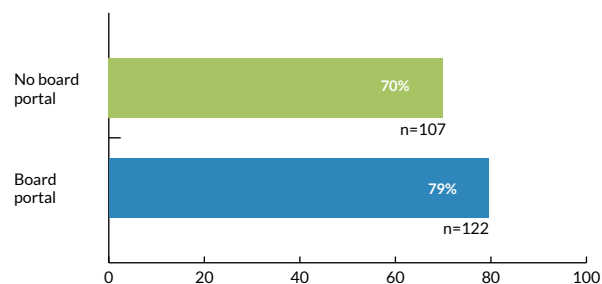


The organization makes it easy for board members to communicate with one another.



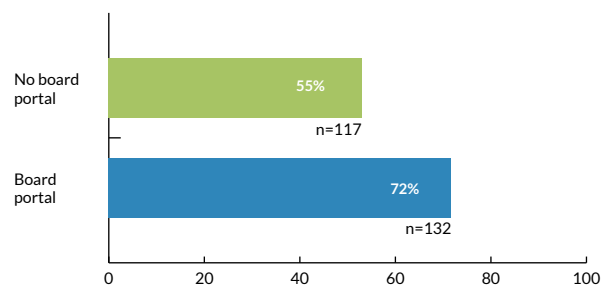
Members that use a board portal are more likely to be satisfied with their contributions (79%) than non-users (70%). In Section 2, we outlined board management factors such as access to resources, timely receipt of board materials, productive meetings and utilizing board member skills. These characteristics are positively correlated with increased board member satisfaction. Similarly, board portal use—which likely facilitates these qualities—is shown to increase member satisfaction.

Satisfied with their contributions as a board member.

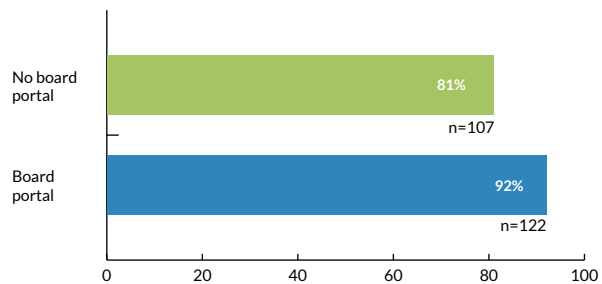


Most notably, board portals users agreed that processes exist to act on member feedback more often than non-users, and they were more likely to believe that the board has a significant, strategic impact on the organization. **Specialized board management software can drive action.** It can keep the strategic vision, goals and responsibilities easily accessible, and thus top-of-mind. Agenda items are more closely tied to long-term objectives, and board activities become more focused, productive and actionable.

Processes exist to collect, evaluate and implement board and committee suggestions.



The board has a major or moderate impact on the strategic direction of the organization.

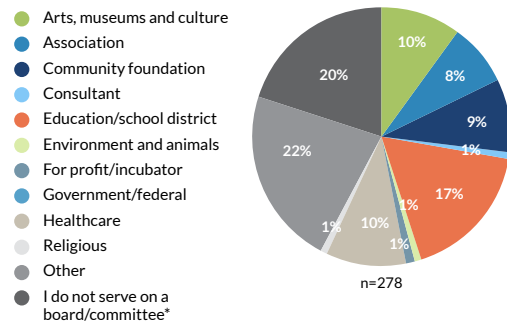


To learn more about board management software and the impact it can have on your board, [demo BoardMax today](#).

Appendix

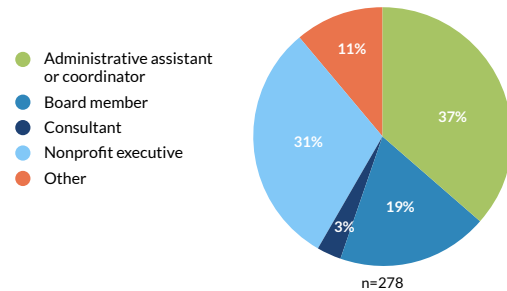
Respondent Demographics

Organization Type

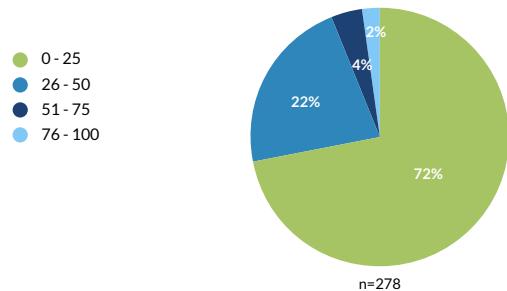


*Note: The majority of these respondents do not serve on a board or committee, but are involved in board management as administrators / coordinators or executives.

Role



Board Size





About BoardMax

BoardMax provides a centralized environment for all board-related information. That means meeting materials and information, organizational documentation, task assignments, and member records are logically organized and available 24/7 to board, committee and staff members.

Unlike other board portals, BoardMax also makes it possible to operationalize your organization's strategic plan. A multi-year strategic plan, goals and strategies can be housed and tied to meetings, members and tasks, and paired with robust reporting capabilities. As a result, the organization's focus is kept front and center.

Built-in tools help ensure your organization is compliant with IRS requirements, accreditation bodies, fiscal audits and board expectations.



About StreamLink Software

Founded in 2008, StreamLink Software (StreamLinkSoftware.com) is [the leading board and grant management software-as-a-service technology provider](#) for nonprofit and public sector institutions.

The company's flagship grant management solution, [AmpliFund](#), automates hundreds of complex activities throughout the grant lifecycle, thus freeing up valuable resources to pursue additional funding. Its board management portal, [BoardMax](#), helps organizations engage and communicate with board members.

Connect with StreamLink Software on [Facebook](#), [Twitter](#), [LinkedIn](#), [YouTube](#) and on [our blog](#).