



# BOARD ENGAGEMENT PLAYBOOK

7 TENETS FOR SUCCESS

# Introduction

Nonprofits are at a crossroads when it comes to board engagement and communication. Over the past few years, corporate businesses have realized that rallying customers behind a value-based mission creates a personal attachment to their brand, which has led them to nonprofits for inspiration. Nonprofits deeply understand their “why” and it drives everything they do.

But on the other hand, nonprofits have started to realize that corporate, professional board management can help board members become involved and engaged in the nonprofit's outcomes, which has led them to corporate boards for inspiration. As more nonprofits continue to acknowledge this need for a business model, value proposition, and scalable board strategy, executing a “professional” board engagement strategy has emerged as an ongoing (but necessary!) challenge for many boards.

Essentially, corporations need to think more like nonprofits and nonprofits need to work more like corporations. And, in both cases, it all starts with the board.

## UNCOVERING THE IDEAL NONPROFIT BOARD

Nonprofit boards are typically made up of local business executives or community leaders who are in place to help a nonprofit be successful. While a nonprofit board is a time-consuming, unpaid, volunteer position, board members all lead

extremely demanding, busy lives. This means that accountability, structure, and overall professionalism of nonprofit board meetings and board engagement are often the first things that fall to the wayside when things get too busy. In the perfect world, a nonprofit board is consistently providing a nonprofit with the tools to be successful while the nonprofit itself is delivering the right solutions the board members need to do their jobs.

According to a [recent survey](#) of nonprofit board members, nearly 50% of respondents said their average board member was only ‘generally’ connected to the nonprofit's mission and was not familiar at all with day-to-day outcomes or programming. Without a personal investment or connection to a nonprofit organization, board members aren't strongly motivated to actively fundraise or even enable the organization to fundraise on the back end – two main performance indicators of active and engaged board members.

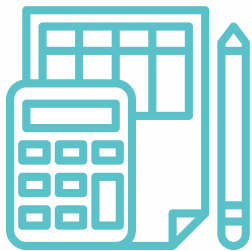
## THE 7 TENETS FOR BOARD MEMBER ENGAGEMENT SUCCESS

In order to empower nonprofits to successfully engage board members and build a more professional, more accountable board, here are seven key tenets of board engagement along with actionable tips and best practices for both nonprofit administrators and board members themselves:



# 1

## Preparation



**A LACK OF PREPARATION CAN DERAIL MEETINGS AND WASTE VALUABLE TIME.**

This tenet of board member engagement is pretty straightforward, but it's also one of the most critical. Board members are engaged if they're prepared for meetings, actually reading board documents, and coming to meetings with talking points and ideas. Board members have a fiduciary duty to the nonprofit they serve, and many times this responsibility is neglected because board members don't know what they're supposed to be voting on or discussing. They are simply not prepared. This phenomenon can quickly spiral into a recurring issue that can derail meetings as administrators and prepared board members have to waste valuable time attempting to get everyone on the same page. In fact, 42% of nonprofit board members wish other board members were more prepared for board meetings.



Tips for Nonprofit  
**Administrators**

*While you might have tons of content to share with board members, sending out a 70+ page document three days before a meeting is not helpful or respectful of your board members' time. Instead, send real-time updates to board members throughout the weeks between meetings, and then in the days leading up to a meeting send the top five critical topics for discussion.*



Tips for Nonprofit  
**Board Members**

*While your personal and professional life may be demanding, your presence on a nonprofit board means that you have a critical voice in the decision making and strategic vision of the nonprofit. Keep constant tabs on both organization and board conversation so that you're not scrambling to figure out what's been going on between meetings.*



# 2

## Attendance



**ATTENDANCE SIGNALS A STRONG, EMOTIONAL ATTACHMENT TO THE CAUSE.**

While actually showing up to board meetings might sound like low-hanging fruit, it's one of the most important parts of facilitating an engaged board. Showing up (whether in-person or virtually) and being mentally present during board meetings shows that board members actually care about the mission and the value of the nonprofit they're working with. Unfortunately, many boards struggle even to reach quorum at a meeting because board members just don't attend. Attending a board meeting shows that a board member has a strong, emotional attachment to the cause, and it ensures that critical resolutions and decisions are passed. One responder in a recent board [survey](#) shared how they handle issues with board attendance: "We just recently changed our bylaws to specify attendance requirements and those who aren't actively attending meetings will be replaced. It helped open up seats for new members and allowed the board to remove members that had poor attendance."



Tips for Nonprofit  
**Administrators**

*Schedule out your board meetings well in advance (for the whole year, if possible) to give board members enough time to prepare their schedules. If possible, send out a link to a virtual meeting space where board members can attend remotely as a last resort.*



Tips for Nonprofit  
**Board Members**

*If you're not attending board meetings because you're too busy, then it might be time to rethink your dedication to the cause and give your spot on the board to someone more dedicated. Similarly, if you aren't engaged at meetings, determine if there is another board position available that might be more personally rewarding.*



# 3

## Follow-through



**HEALTHY,  
ENGAGED  
BOARDS FOLLOW  
THROUGH ON  
COMMITMENTS.**

In many situations, holding board members accountable to their commitments is the hardest part of managing an engaged board. After the meeting concludes (even if there was great conversation and discussion), ensuring the next steps are taken is another challenge entirely. A staggering 47% of respondents in a recent nonprofit survey said that board members need to be more engaged with follow-through on assigned tasks. Healthy, engaged nonprofit boards follow through on commitments while unhealthy boards have no sense of accountability or follow-through. An effective board functions as a high-output team, and on these healthy teams, everyone can be trusted to do what they're tasked to do, no matter how difficult and uncomfortable the conversation is.



Tips for Nonprofit  
**Administrators**

*You can proactively streamline the follow-through process by automating the entire board communication and engagement system. With a digital board management platform, you can give all board members access to the content they need in advance, organize it in a way that makes it easy to understand, and set action items to get things done.*



Tips for Nonprofit  
**Board Members**

*Don't be afraid to have difficult conversations with your other board members or the administrator. Trust in your peers only develops if you are completely comfortable and sure of those around you, and this comfort only comes with transparency. Board members shouldn't be hesitant to bring up difficult topics or opinions if they can help move the nonprofit forward.*



# 4

## Volunteering



**VOLUNTEERING HELPS CREATE A DEEPER RELATIONSHIP BETWEEN A BOARD MEMBER AND THE NONPROFIT THEY SERVE.**

Not every nonprofit needs its board members to volunteer, but most mission-driven organizations should want their board members to really know what it is they're trying to accomplish on a tactical level. Being on a board is not all about simply showing up to the gala – it's also about showing up to the food drive or community build. That's why [47% of nonprofit respondents](#) said they wished their board members volunteered more in program activities. While it's certainly possible to be a great board member without volunteering, this often-neglected tenet helps create a deeper relationship between a board member and a nonprofit that can make them more personally invested in the decisions that are being made. Actively volunteering creates a connection that just going to board meetings might not. And remember, a connected board is an engaged board.



Tips for Nonprofit  
**Administrators**

*When you're setting expectations for new board members, include volunteering as a tenet alongside attendance and fundraising. You should be able to expect board members to attend different volunteer events and get their hands dirty.*



Tips for Nonprofit  
**Board Members**

*As a board member, you don't want to dread going to meetings or feel as though being on a board is an obligation. Volunteering helps connect you to the why behind a nonprofit's mission.*



# 5

## Advocacy



**FAILURE TO ACT AS A COMMUNITY ADVOCATE MAY BE A SIGN OF WANING ENGAGEMENT AND EXCITEMENT.**

By joining a board, board members are making a public statement that they believe in the mission and value of a nonprofit organization. Excluding “LinkedIn” board members (those that serve on boards just for appearances), it can be inferred that these people are passionate and invested in what this mission stands for. Yet according to the 2017 [Leading with Intent](#) report, 43% of chief executives and 42% of board chairs include outreach efforts and acting as ambassadors for the organization as one of the three areas most in need of board improvement. If board members fail to act as community advocates and vocal supporters of a nonprofit, it could be a sign that the engagement and initial excitement that once connected a board member to a nonprofit isn’t there anymore.



Tips for Nonprofit  
**Administrators**

*In order to ensure that your board members are engaged and involved with your organization, keep track of different advocacy campaigns or messages (social posts, emails, in-person support, etc.) from different members, and then assign everyone an “advocacy score.” Your board members are naturally competitive and encouraging friendly competition will increase their engagement and the organization will benefit.*



Tips for Nonprofit  
**Board Members**

*According to [BoardSource](#), advocacy is an essential responsibility of modern board members. Don’t shy away from sharing the value of your nonprofit with others. Leverage the content your nonprofit team has already pulled together to share with your networks.*





# Fundraising



**FUNDRAISING IS AS MUCH A PART OF A NONPROFIT BOARD MEMBER'S RESPONSIBILITIES AS MAKING LEADERSHIP DECISIONS.**

At the end of the day, fundraising is as much a part of a nonprofit board member's responsibilities as making leadership decisions or bringing big-name sponsors to the table. According to a [2015 survey conducted by Stanford Business](#), only 42% of nonprofits have a "give or get" policy that requires each board member to donate a minimum amount each year or raise that amount from others. Of course, no nonprofit selects its board solely based on connections or network, but knowing how to work this network is a key attribute to look for in board members. And, at the very least, board members should be comfortable working with nonprofit staff and community members to improve development outcomes during campaigns.



Tips for Nonprofit  
**Administrators**

*Get to know the strengths and weaknesses of your board members. Empower them by providing tools like workshops that cover how to fundraise in a way that is consistent with the board member's personality and values.*



Tips for Nonprofit  
**Board Members**

*Nearly 50% of surveyed board members think that other board members can be more active in corporate support asks from employers, networks, and peers. Have a plan in place when interviewing for your board position on how you will capitalize on these networks down the road.*





# 7

## Donating



**A SIGN OF A DISCONNECTED BOARD MEMBER IS A LACK OF DONATION ACTIVITY.**

More than 68% of nonprofits have some sort of fundraising/giving policy in place for board members yet 33% of respondents in a recent survey would like to see their board members more engaged with personal financial contributions. Fifty-seven percent of the charitable organizations in a Nonprofit Research Collaborative (NRC) study required board donations, yet only 10% or less of total donations came from gifts by board members. While making financial contributions isn't always required, engaged and connected board members should want to help drive a nonprofit organization toward success. A sign of a disconnected board member is a lack of donation activity. While nonprofits don't have to force board members to donate, it should be noted who is not making regular donations, as these people could be falling behind in terms of engagement and involvement.



Tips for Nonprofit  
**Administrators**

*In order to motivate board members to donate more, show the difference they're making by keeping a scorecard (either digital or analog) that shows what percentage the board has given. According to Forbes, making board members proud of what they're bringing to the table financially can help motivate them to be more engaged and involved in other ways.*



Tips for Nonprofit  
**Board Members**

*Don't play dumb when it comes to donating. As a board member, you should want to donate time, talent, and treasure to your nonprofit. If you're not feeling personally motivated to donate, it's your responsibility to work with your board peers to find someone who feels a personal connection to the mission.*



# The Nonprofit's Checklist

## 5 THINGS YOU CAN DO TO ACTIVELY ENGAGE YOUR BOARD



- Create a one-stop-shop online command center with critical documents, past meeting minutes, and any updates they need for real-time visibility.
- Provide all board members (both new and tenured) with a clear list of expectations and guidelines that outline the requirements for attendance, volunteering, fundraising, and donating.
- Give your board an online forum or communication channel where they can share ideas and vote on any upcoming decisions to facilitate engagement.
- Keep your board members apprised of any upcoming fundraising campaigns, volunteer opportunities, or one-off events that they can attend.
- Build an on-the-go tool kit that board members can easily access from their smartphone or laptop to share key facts and figures with others about your nonprofit's mission.



# About Boardable

**Built by nonprofit leaders, for nonprofits.** Boardable empowers you to work more effectively with your boards and committees. We know the frustration you feel (and the hours you lose) just from organizing a meeting via email, phone, and text. We've lived it. We're from the nonprofit world, too. After looking around for the right tool but not finding it, we decided to build it. Boardable is a software platform that centralizes all communication between you and your board. Find the best meeting times, securely store all of your documents, archive discussion threads and more—all in one place.

For more information, to schedule a demo, or to sign up for your FREE trial, visit us at [boardable.com](https://boardable.com)



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