IMPROVING BOARD MEMBER ENGAGEMENT

BOARD ENGAGEMENT AFFECTS CHAPTER SUCCESS

Recognize the signs of an unengaged board.

For signs that a board member may be unengaged, why it matters, what might be causing it, and tips to reengage, click HERE.

Start off strong with an exceptional onboarding experience.

Find 6 Steps to Onboarding New Board Members HERE.

Evaluate board performance on a regular basis.

- Board Member Survey questions HERE
- Board Member Self-Evaluation Form HERE

Make volunteering and fundraising mandatory.

Reasons why and creative ways to do it HERE.

Streamline meeting planning and updates.

- Tips and suggestions HERE.
- Board Meeting Agenda in Fillable PDF form HERE.

Tips on establishing committees.

Click HERE.

CMSA MEMBERSHIP COMMITTEE

For assistance email Kelly Castady
kcastady@parthenonmgmt.com

WE WANT YOUR FEEDBACK

Please complete the follow-up survey to help us serve you better!

CLICK HERE

SIGNS YOUR BOARD IS UNENGAGED

Individuals who are not fully invested:

- Delay or even forget to carry out planned tasks. Each board member is responsible for carrying their own weight. When one person forgets to complete their assignments, it can throw everyone else off and delay progress.
- Become bottlenecks, slowing board or committee momentum. A disengaged board member can become passive and stop generating new ideas. This general lack of engagement can be contagious, diminishing others' momentum in the boardroom. This domino effect can impact your chapter initiatives.
- Forget to review meeting documents in advance. Reviewing documents ahead of time allows board members to come prepared with thoughtful insights and questions. Otherwise, everyone's time will be wasted as ill-prepared board members struggle to skim documents during the meeting.
- Become spectators at meetings. Meetings are when your team brainstorms ways to maximize organizational impact, and poor participation levels can decrease productivity and negatively influence other attendees' enthusiasm.
- Lose track of communication threads. Those who aren't entirely engaged seldom feel motivated to respond between meetings, which can ultimately hold your entire team up when pursuing important initiatives.
- Ratchet down their donations or fundraising energy. Fundraising or bringing in sponsorships may be one of your board's core responsibilities, and a passive approach won't cut it. Poor board engagement may lead to a decline in revenue if your board members don't step up to the plate with plenty of enthusiasm.
- Let public relations and promotional efforts lapse. Board members are the frontline advocates for your mission, and positive public relations will help your team flourish by increasing visibility for all the impactful work you're doing.
- Miss key events. When it comes to special events, board members must show up and actively encourage participation. After all, it's challenging to garner support when those closest to the organization aren't seen showing support themselves.

SIGNS YOUR BOARD IS UNENGAGED (Continued)

Your board members might have one or more of these reasons for feeling disengaged:

- Frustration with the speed of progress. Nonprofit work can be slow and draining, and it can take time to enact large-scale changes. Board members might not be accustomed to this slow march toward progress.
- Little-to-no recognition for their contributions. Board members don't expect a massive parade to be thrown in their honor, but they certainly expect a thank-you now and then. They can start to feel disengaged if they feel they aren't being appreciated.
- Board discord. Board members might be facing collaboration challenges or general discord in the boardroom. A lack of camaraderie or teamwork among board members can lead to many of them starting to tune out.
- Lack of direction or training. Board members might feel disconnected from or uncomfortable in their roles if they haven't received proper training or direction.

HOW TO RE-ENGAGE YOUR NONPROFIT BOARD

The key to reawakening your board's zeal is to remind them why they signed up in the first place. Board members benefit from a strong emotional connection to your mission.

Identify their original intentions when they agreed to come on board (pun intended) to connect that personal emotion to renewed commitment and future impact for your organization.

Step 1: Find Out Why Members Joined Your Board.

When asking a disengaged board member why they joined, most will say they are passionately connected to your cause. While that's likely true to a certain extent, few people will be upfront with the less-altruistic reasons behind their board service.

And it's totally fine to have some somewhat selfish reasons for pitching in at a nonprofit organization. After all, you wouldn't expect them to want nothing in return for hours of hard work.

HOW TO RE-ENGAGE YOUR NONPROFIT BOARD

Getting to the crux of board members' motivations could be as simple as going to lunch or making a phone call and asking some questions. Here are some examples of questions to ask that may reveal the truth:

- Question: "You have been so helpful to our chapter. I want to make sure we can give back to you as well. Is there anyone I can make an introduction to that may benefit you in your career?"
  - What You're Really Asking: Are you interested in networking opportunities?
- Question: "We are considering running a high-profile event and need some well-connected individuals to help us reach the right people. If it takes only an hour of your time, would you be willing to be the Lead Ambassador for our event? We would simply need you to share a post about the event on your LinkedIn page and add a comment about your personal connection."
  - What You're Really Asking: Do you want to raise your career profile?

Remember, these are just examples, and you'll probably need to use a little creativity to get to the bottom of why board members decided to get involved with your organization.

Step 2: Offer Board Members an Opportunity.

Once you know why your board members joined, offer them an opportunity that fits their motivations. Give them something they truly value, such as an introduction to a valuable professional connection, an honorary title to add to LinkedIn, a platform to share their personal story, or a chance to feel truly connected to the impact you make. After you offer board members what they want, you can then ask them for their help and engagement in return.

Step 3: Ask for Specific Help in their Area of Strength.

After giving board members something they value, it's time to engage them more deeply in your chapter's work.

Remember, there is a reason you asked this person to be on your board. Was it for their fundraising experience or network? Was it because they have a background in public speaking and the potential to be a powerful advocate? Ask for specific deliverables related to each member's skills, interests, or professional background.

Be specific with your requests. For instance, don't ask a well-connected person to introduce you to sponsors; look at their LinkedIn profile and ask them to introduce you to three prominent people within their connections list who may be ideal sponsors.

HOW TO RE-ENGAGE YOUR NONPROFIT BOARD

Step 4: Engage Board Members' Emotions.

You have offered board members something valuable, then asked them to do something specific; now, you want to tap into their emotions to drive deeper engagement. Humans are emotional beings, and there is nothing in this world more powerful than the feeling of purpose and fulfillment.

Show them the impact of what they did for you. If they introduced you to a sponsor, impact their support made and then remind them their introduction made it possible. If they spoke about your cause in front of a crowd of event attendees, let them know how many attendees decided to join the chapter after their speech.

Creating an emotional connection to positive real-world impact is your best chance at re-engaging your board. It's this personal connection to your mission that will keep board members engaged for the long term.

Adapted from Boardable & Keela

6 STEPS TO ONBOARDING NEW BOARD MEMBERS

Boards are tasked with making strategic decisions and choices that drive long-term financial and charitable success. This is why effective onboarding is so critical. Whether you're bringing new members onto a board that has been together for years or you're starting a board from scratch, onboarding new board members empowers and prepares them for the job ahead.

Step 1: Onboarding Starts with Recruitment

Contrary to popular belief, onboarding doesn't start the day a new board member walks into the room or even when you send a "Welcome Aboard" email. Onboarding begins in the early recruitment stages. It is no small feat to find the right combination of creativity and enthusiasm in prospective board members. Will they mesh well with your current board members? It's a gamble.

When you're recruiting new board members and deciding which attributes to focus on, keep the following in mind:

Fundraising Skills:
While fundraising might not be the number one thing that board members advertise, it's definitely one of the most important things they're responsible for (especially when you factor in recruiting year-long partnerships and event sponsors). If you're creating an application or announcement for new board members, point out fundraising skills as a necessary requirement.

Mediation Skills:
Being on a nonprofit board is a masterclass in compromise and discussion. New board members can often feel overwhelmed or overpowered by other members who have been there longer or who have assumed leadership or spokesperson roles on the team. Look for board member candidates who are willing to learn patiently. And remember, finding veteran board members who are willing to mentor new people can be helpful, too.

Expectations & Goals:
Because board members are volunteers, and because finding the right people for a nonprofit is so critical, many nonprofit board members are often unaware of the actual responsibilities associated with the day-to-day work of being on a board. During the initial outreach, make sure you're completely transparent with board candidates about board expectations, members' roles, and how success will be measured.

Step 2: Develop a Framework

When new board members start, it can be tempting to jump in feet first, get them set up on committees, and have them start making decisions right away – without ever allowing the member time to get acclimated.

Instead, have an onboarding framework that is replicable and scalable. This ensures that every single new board member hears the same message, learns the same processes, and experiences the same lessons.

According to Board Source, a strategic onboarding framework should include:

- *A broad, inclusive approach to the mission and values of the nonprofit.*
  - *What are board members trying to achieve?*
- *The input of current board members.*
  - *What would have made their early days on the board better?*
  - *What would have made them more productive?*
- *A detailed description of all committees.*
  - *What kinds of decisions and programs are each committee responsible for?*

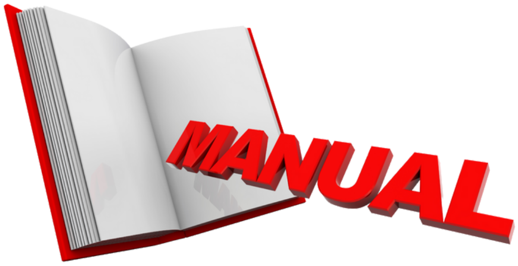
Step 3: Determine Who Owns Onboarding

The best boards ensure each person has a unique role or responsibility that allows the board to operate like a mini corporation.

With one committee owning onboarding, there should be minimal overlap between teams. This group is responsible for gathering the correct information and documentation from all the other committees, from the nonprofit team itself, and from any third-party thought leaders. This will also give new board members an important resource to go to with any questions, concerns, or inquiries instead of having to hunt down several different people from different teams.

Step 4: Collect and Organize Onboarding Components

For those of us who have experienced board work, it's no surprise that boards require an incredible amount of content and information. This is especially true for new board members, who should have access to all of this critical content and more. This is where the board manual enters the conversation. Typically, the onboarding owner would be responsible for collecting and organizing all components of a board manual, which include:



- Chapter Staff & Programs
  - List of any current staff, including job titles
  - Organization chart showing the structure of the chapter
  - Chapter policies and procedures
- Chapter Information
  - Brief written history, fact sheet, or overview of the chapter
  - Articles of Incorporation, bylaws, and IRS determination letter
  - List of past board members and their roles
- Logistics & Policy Information
  - List of current board members' names, contact information, bios, and roles within the board
  - Board terms of all current board members
  - Statement of responsibilities and expectations of board members
  - Board meeting attendance policy
  - Board member Conflict of Interest policy
  - Operational calendar that can be updated annually
- Organization & Operational Guidelines
  - Policy for recruiting, orienting, informing, and cultivating board members
  - Policy for unplanned board member exit
  - Expectations and guidelines for board member performance self-evaluation
  - Descriptions of different committees, task forces, or subcommittees
- Strategic Framework of the Chapter
  - Mission and vision statement
  - Strategic plan and roadmap of the organization
  - Detailed action plan including objectives, responsibilities, timelines
  - Ongoing status reports for the chapter

Step 4: Collect and Organize Onboarding Components (continued)

- Meeting Minutes & Reports
  - Six months to a year’s worth of past board meeting minutes
  - Reports and documentation from past committee meetings
  - Any other reports, metrics, and minutes from directors

- Finance & Fundraising Overview
  - Financial reports for the chapter, including prior annual report, most recent audit report, and current annual budget
  - Financial forms required for a nonprofit organization, including Form 990, banking resolutions, and investment policy
  - Details around fundraising, including current sponsor list, fundraising plan, and a list of go-to fundraising sources

- Supplemental Information & Appendix
  - Contact information, including the chapter's website and donation site
  - Promotional materials such as marketing pages, branding guidelines, and messaging overviews
  - Guides for any tools or resources your team is using to manage board output
  - Emergency contact info and communication plan

Step 5: Engage Board Members

In many cases, new board members are elected to serve on a board by the current members, so they’ve met each other already. Regardless, once a new board member has been brought in and been sent the board manual, it’s time to get them engaged with other board members.

According to *Create the Future*, introducing new board members to current board members can be done through:

Social Events or Gatherings:
Once you have new board members, it’s a good idea to have an informal social gathering before your first board meeting. This way, your new board members will get to know their peers on a social level, which can help ease any wariness or discomfort before the first meeting.

Committee Roundtables:
If your committees are meeting on days outside of your normal board schedule, have the new members attend these as observers. New board members should attend committee meetings for all committees, not just the ones they will be a part of, to get an inside look at how each committee is managed, how it comes to decisions, and the ways different members of each team work together.

Step 5: Engage Board Members (Continued)

Board Meeting Introductions:
And finally comes the big day — the new board members' first board meeting. Before you kick things off like any other meeting, make sure you introduce your new members to the group. Have everyone else go around and introduce themselves along with the roles they play or the positions they hold on the board. Give the new members a chance to give a brief bio along with an explanation of the connection they have with the chapter.

Step 6: Optimize the Onboarding Process

For nonprofit boards, much like other industries and teams, work is never really done. There are always new processes, ideas, and procedures that can be implemented to build a more seamless, productive organization. This is why metrics, feedback, and transparency are all so critical.

As a chapter leader, providing valuable resources to your board members will help them continually develop new skills and grow in their positions, which will ultimately help your chapter be more successful.

At no point in the process is this more important than during onboarding. Luckily, optimizing this process isn't a one-person job. Every new board member that comes through your doors will have feedback, suggestions, and ideas for the onboarding process.

While your board should have a single scalable process to work from, it should not be static by any means. All feedback should be measured and weighed to determine whether or not it will make your onboarding process stronger.

This includes asking questions like:

- What content are new board members receiving?
- What content do they find valuable?
- How are new board members accessing your board manual and other onboarding documents?
- What kinds of communication are being sent before new board members' first meeting
  - What about communication to other board members welcoming new members?
- Can new board members confidently speak to the mission, vision, and goals of both the nonprofit and the board itself?

Adapted from Boardable

BOARD SURVEY QUESTIONS

BOARD EFFECTIVENESS

1. How would you rate the board's effectiveness?
2. How would you rate the board meetings?
3. What would you change about the board meetings?
4. What should board members do more of? (Examples: contribute professional talents and resources, tap networks for donations, follow through on assigned tasks, brainstorm for campaigns)
5. How might we keep developing and inspiring our board? (Examples: diversity of board recruits, virtual meeting options, or board education opportunities)

BOARD DYNAMICS

1. Our board is welcoming and inclusive of all of our directors.
2. Board deliberations are open and constructive.
3. All directors are involved in our discussions and decisions.
4. Board members come to meetings well-prepared and focused on the work
5. Committees effectively assist Board with oversight of their respective areas.

PERSONAL ENGAGEMENT

1. On a scale from 1 to 5, what level of preparation and participation do you dedicate to board meetings?
2. How well do you understand your role as a board member? Are expectations clear?
3. What challenges do you face in your role?
4. Do you think you could describe our mission and accomplishments in an elevator speech?
5. BONUS: What other thoughts and ideas do you have to improve nonprofit board engagement?

ONBOARDING QUESTIONS

1. Area of expertise:
2. What times are you most likely available for internal meetings?
3. What times are you most likely available for external events?
4. What skills do you have that might be useful during your time on the board?
5. What motivated you to join the board?

Adapted from OnBoard & NonProfitPro

MANDATORY VOLUNTEERING & FUNDRAISING

Why should chapters require board members to bring in funds?

Because it is the best way to ensure that each board member has “skin in the game.” Personal outreach and sponsor recruitment sets the stage for engaged fundraising by board members. Which in turn, encourages others to follow their example.

It’s essential to communicate that you’re not asking your board to donate per se, nor will you be hounding their networks for money. *Instead, think of creative ways to involve board members in fundraising:*

- Focus on expanding the pool of prospective sponsors through the existing contacts of their board members.
- Require minimum sponsorship recruitment from board members. The amount is less important than that everyone participates.
  - 1 sponsor per quarter
  - A certain dollar amount per year
- Set up a development or sponsorship committee made up of board members (Involve the group in planning and monitoring fundraising efforts).
- Encourage them to reach out to local leaders in the community or share your campaigns on their social media.

One of the responsibilities of boards is to help their organization become financially healthy. Indeed, boards have a fiduciary duty to help the organizations with which they've engaged raise funds, and use those funds responsibly in service to its mission.

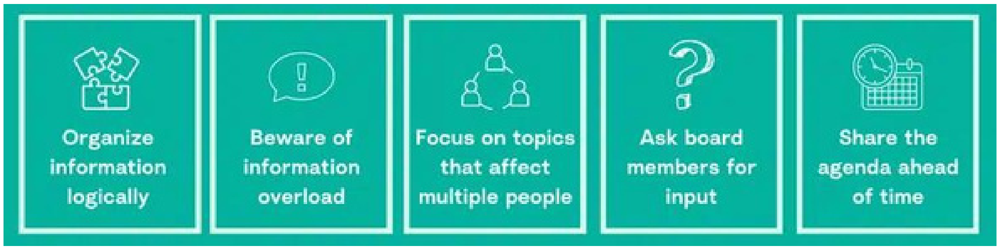
Other creative ways to engage your board through volunteering:

- All-hands-on-deck phone campaign to lapsed members with snacks and discussion breaks
- Brainstorming sessions for events and educational topics
- A meet-the-board CE session where they engage in a pre-determined Q&A session with your membership

Adapted from BoardSource & LiveAbout

STREAMLINE MEETING PLANNING AND UPDATES

Your board meeting agendas are the foundation of every meeting you run. They set the tone for how engaged (or conversely disengaged) everyone will be. Yes, they include a list of everything you want to cover, but they're much more than that. It takes more than just creating a simple governance checklist and calling it a day. The roadmaps you create for your board meetings are essential to engagement and productivity.



Organize Your Board Agendas Logically

Here are some ways for organizing better board agendas:

- **Freshen up your approach.** Your board meeting agendas don't always have to look the same. In fact, board members will probably feel much more invigorated if you address the most important (and potentially game-changing) information first. It's much easier for board members to generate new ideas when their minds are fresh.

- **Include the purpose of the agenda item.** Do they need to make a decision, provide their input, or simply sit there and listen to what you have to say on the subject? Knowing the end goal of each board meeting agenda item makes it much easier to achieve.

- **Set a time duration for each board agenda item.** You already know that your board doesn't need to spend 30 minutes on every single topic. Include a rough estimate of how long each item should take. Say you don't reach the desired conclusion for an item. Just keep it on the board meeting agenda for next time, schedule an offline meeting with interested parties or use email to finish up so you can focus on solving the problems that you can right now.

A clearly organized board meeting agenda will help make sure the conversation flows, so you can cut down on side conversations and get down to business.

STREAMLINE MEETING PLANNING & UPDATES (Continued)

Beware of Information Overload

From reviewing reports to completing the next steps, there's a lot of info that board members need to do their jobs efficiently.

Here are a few tips that work well to avoid information overload with board meeting agendas:

- **Limit packet length.** A good rule of thumb is to limit your board book to 10 pages for an average board meeting and 20 for a special one. Your committees should digest the details and provide a high-level overview for the rest of the board. Otherwise, you'll overload your board meeting agenda and cloud their minds. Then, you're faced with the issue of distracting them from more important details.

- **Minimize the time spent on routine items.** Spend about 25 percent of the meeting on reporting and the "have to's" (like approving prior meeting minutes, financial review, etc.). This leaves the majority of the meeting to discuss strategic direction and other critical issues.

- **Don't stack up reports on your board meeting agenda.** The more you drown attendees in details, the more likely it is that they'll check out. If your agenda has the word "report" on it more than two or three times, you have too many. Board members don't you to talk at them rather than with them.

Focus on Substance

Prioritize board meeting agenda topics that affect multiple members. Topics that are relevant to everyone at the table will be much more meaningful.

Ask for Input

Gathering input is a great way to spark enthusiasm and make sure you don't miss anything important.

At the finish of each agenda item, ask everyone if they have anything to add.

Sometimes members might say that they do not have anything to add, if this happens too often, it might be a sign that your board meeting agenda is too long.

STREAMLINE MEETING PLANNING & UPDATES (Continued)

Send your Board Meeting Agendas Ahead of Time

You've created a board meeting agenda with actionable discussion points and key decision-making items. If you really want to get the most value out of your board agendas, you'll want to go ahead and share them with everyone.

Attach anything they should review in addition to the board agenda, like reports and other documents. They can take a look at them at their leisure and use actual meeting time for discussion.

By sending your board meeting agendas out ahead of time, you're saying, "Hey, I value your time and want you to have the chance to think about how you want to contribute to the conversation."

Additional suggestions:

- Send out your meeting packet with the agenda, minutes, and attachments in a single PDF
- Add bookmarks to each section for easy reference
- Include any tasks or action items that need to be completed prior to the meeting in the body of the email

Adapted from Boardable

ESTABLISHING COMMITTEES

Board committees are usually made up of a selection of board members, staff, and volunteers.

The purpose is to assign the most qualified team to a specific aspect of the chapter's operations, so they can work toward specific goals while providing expert advisory councils for the board on these subjects.

Committees enable the board to get more accomplished by outsourcing projects and bringing in volunteers with specific and relevant expertise.

A few tips:

- Establish a committee chair and vice-chair. Motivated leadership is essential to productivity.
- When assigning board members to serve on committees, limit their participation to preferably one committee and a maximum of two, to prevent burnout.
- Set term limits in advance. 2 years is a common length of service.
- Diversify: Don't limit yourself to tried-and-true members. Approach individuals who have recently joined the association who will bring fresh ideas, eagerness and energy to the meetings. Also, remember that by participating, they will gain a stronger loyalty to the chapter.
- Be sure to match volunteers with committees that will utilize their special skills.
- Remember to implement onboarding practices for committees, too.
- Utilize the tips to STREAMLINE MEETING PLANNING & UPDATES.
- Committee chairs should delegate, delegate, delegate! If everyone on a committee does a little, then no one person has to do it all. Also, by delegating, all members of the committee will get to participate and all of the responsibility won't fall to a few.

Options for Committees:

- Finance
- Fundraising/Sponsorship
- Communications/Marketing
- Education
- Membership
- Governance
- Public Policy
- Ad hoc, temporary committees as needed

Adapted from Springly, Boardable and NonProfitPro