

A high-angle, top-down view of a group of business professionals sitting around a large white conference table in a modern office setting. They are engaged in a meeting, with some looking at laptops and others at each other. The image is overlaid with a semi-transparent dark blue circle containing the title text.

# THE BOARD ENGAGEMENT PLAYBOOK:



7 Tenets For Success



A digital resource provided by your friends at Boardable



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# Introduction

The market is growing increasingly competitive for mission-driven organizations and companies alike. With more professional development resources available than ever before, professionals are constantly looking for the best opportunities to build their credentials, grow as individuals, and ultimately expand their horizons.

Between balancing personal lives and advancing their professional careers, board members are constantly having to prioritize different aspects of their life. This can distract them from their commitment to your organization. Because of this, CEOs and board officers have to get creative with engaging their board members if they want them to stick around, learn the ins and outs of the organization and industry, and fully embody the mission.

**Capturing members' attention when they first join the board comes naturally, but as they grow comfortable in their roles, the excitement of taking on a new position may fade. And with that goes their engagement.**

To support you in your mission to reinvent the board experience, the experts at Boardable have put their heads together to create this ultimate playbook for enhancing board engagement. After working with thousands of boards, we've seen organizations get incredibly creative with their strategies. We've also seen others fall short, letting engagement fall by the wayside. In other words, we fully understand what it takes to engage your board – no matter what mission you're seeking.

As you rethink your engagement strategies, bear in mind that all the extra effort will be well worth it as you start to see your board more intentionally pursue your mission. With the extra attention, board members will want to go above and beyond in their roles. They'll strive to have a collaborative partnership with one another, work hand in hand with your organization's leadership, and even spend their off-time working toward your mission outside of the boardroom. Now, let's supercharge your board engagement!

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# The Relationship Between Corporate and Mission-Driven Organizations

To engage board members and consumers alike, corporate businesses have been drawn to mission-driven organizations for inspiration. Corporate professionals have taken note of how these organizations rally board members and supporters behind a value-based mission by creating a personal attachment to their brand. Mission-driven organizations deeply understand their “why,” and it drives everything they do.

On the other hand, mission-driven organizations have turned to corporations for inspiration. These groups have started to realize that corporate, professional board management can help board members become involved and engaged in the organization’s outcomes. As more mission-driven organizations 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 mission-driven organizations, and mission-driven organizations need to work more like corporations. And, in both cases, it all starts with the board.



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# Uncovering the Ideal Board of Directors

Boards at all types of organizations are typically made up of local business executives or community leaders. While serving on a board is time-consuming (and unpaid in the case of volunteer boards), board members all lead extremely demanding, busy lives outside of the boardroom. This means that accountability, structure, and engagement during **board meetings** are often the first things that fall by the wayside when things get too busy.

## The Ideal Board Member



- Access to sufficient resources
- Motivated to tackle tasks
- Willing to leverage personal networks
- Prepared to contribute



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In a perfect world, a board consistently provides its organization with the tools to be successful while the organization itself delivers **the right tech** and resources the board members need to do their jobs.

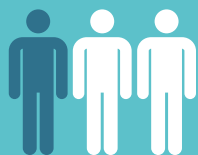
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In this ideal setting, board members are highly motivated to tackle new tasks, leverage their connections for the betterment of the organization, and ultimately pave the way for a sustainable (and thriving) future for the organization.

While the past year was filled with less-than-ideal circumstances, it led to many boards being the ideal team. Just like any other crisis we've faced, the pandemic challenged board members to be their best selves and live up to the expectation of being the prime contributors. Many jumped at the opportunity to prioritize the organization's wellbeing. Not to mention, access to adaptive technology enabled remote and **hybrid board meetings**. This lessened roadblocks for board members and allowed them to focus on more effective participation.

Our **2020 Board Engagement Survey Report** found that, when paired together, the motivation to overcome obstacles and the option to participate remotely led to an increase in board attendance of more than 10% over the past year. 50% of board members also felt more passionate about the importance of their board work.

Board attendance  
increased by more than  
**10% in 2020.**

**50%**

of board members felt more  
**passionate and engaged** about the  
importance of their board work.



Now, it's up to executive directors and other board leaders to maintain this momentum and inspire their boards to continue being exceptional.

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# The 7 Tenets for Board Member Engagement Success

To empower CEOs and board officers to successfully engage board members and build a more professional and accountable board, we've crafted **the seven key tenets of board engagement**. As you explore these components, you'll gather actionable tips and best practices for both **administrators** and board members themselves:

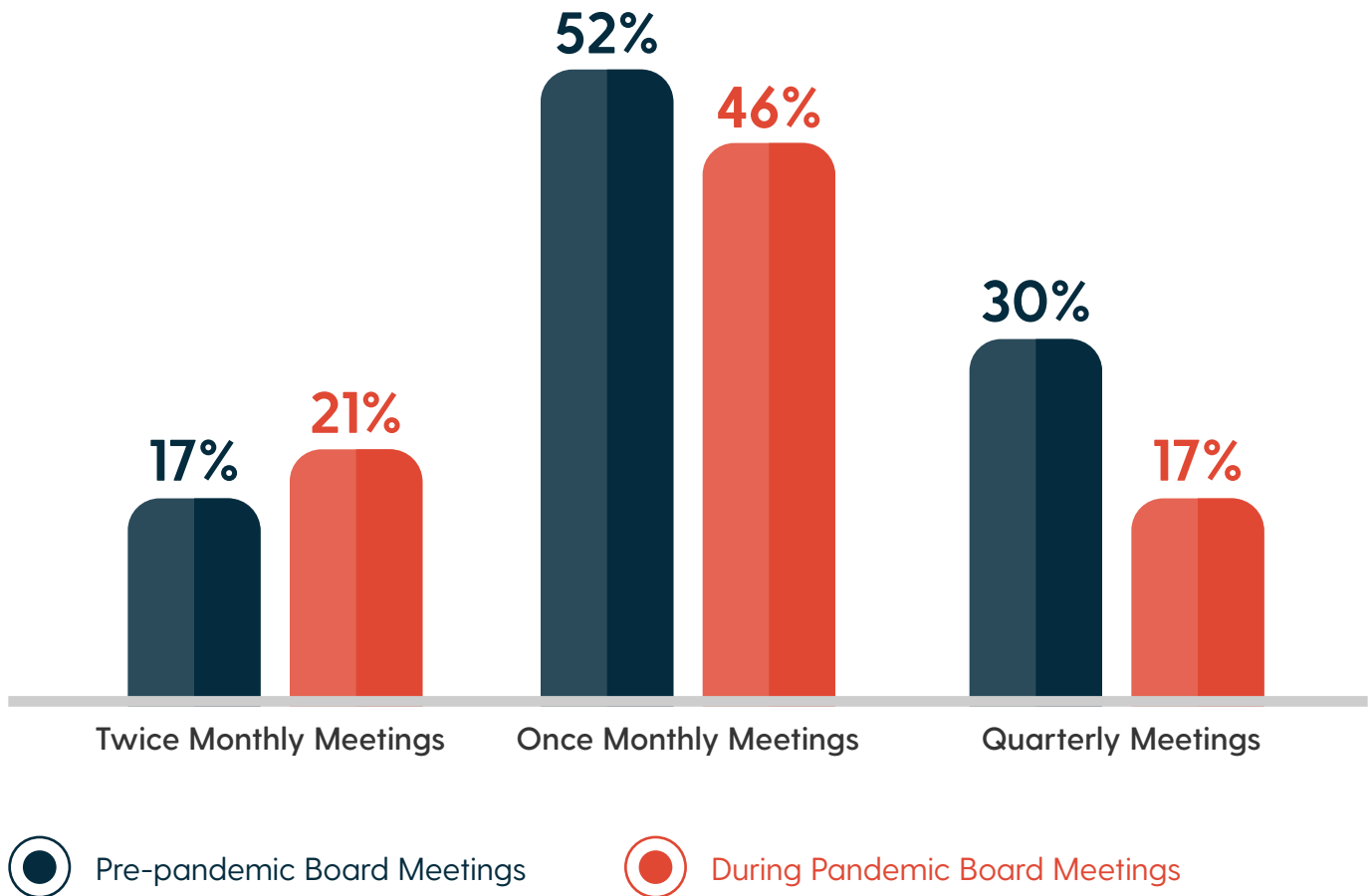
## 1. Preparation

This tenet of board member engagement is pretty straightforward, but it's also one of the most critical. Board members are engaged if they prepare for meetings, actually read board documents, and come to meetings with insightful talking points and ideas. *Easy enough, right?*

While board members have a fiduciary duty to the organizations they serve, this responsibility is often 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 derails meetings when chairs and prepared board members have to waste valuable time attempting to get everyone on the same page.

The ability to set board members up to succeed has become more urgent than ever. In 2020, boards **met more frequently**, but meeting durations largely decreased based on the need for efficiency and urgency. The pivot to digital allowed for more efficient sessions all around. Not all boards were prepared for these changes, however, and outdated processes and procedures became more cumbersome than ever.





## Tips for Administrators



First and foremost, lean heavily into your agendas to guide your meetings and send them at least a week in advance. Then, send content between meetings to ramp up preparation. 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. Then, in the days leading up to a meeting, send the top five critical topics for discussion.



## Tips for Board Members



While your personal and professional life may be demanding, your presence on a board means that you have a critical voice in the decision-making and strategic vision of the organization. Keep constant tabs on both organization and board conversations so that you're not scrambling to figure out what's been going on between meetings. Regularly keep up with conversations within your board portal and thoroughly review documents shared ahead of your meetings.

## 2. Attendance

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 (either in-person or virtually) and being mentally present during board meetings shows that board members actually care about the mission and value the organization they're working with.

Unfortunately, many boards struggle even to reach quorum at meetings because board members just don't attend, either because of scheduling conflicts or poor motivation. Attending a board meeting shows that a board member has a strong, emotional attachment to the organization's mission, and it ensures that critical resolutions and decisions are passed.

Some board members have indicated that they struggle with things like networking and team building in the absence of in-person meetings. It's important to leverage [virtual meeting tools](#) to continue to meet and exceed goals when face-to-face interactions aren't possible. Creatively incentivizing your board members to show up and participate in meetings must always be a top priority.



## Tips for Administrators

Schedule out your board meetings well in advance (for the whole year, if possible). This gives board members enough time to block off time in their schedules. When sending calendar invites, always include a link to a virtual meeting space where board members can attend remotely.

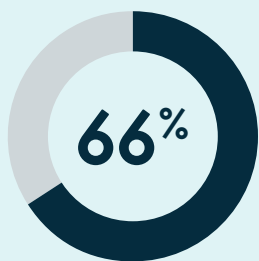


## Tips for Board Members

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 with more availability. 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

In many situations, holding board members accountable for 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.



of survey respondents leveraged new virtual tools to manage board operations last year.

An impressive **66% of survey respondents** have leveraged new virtual tools to manage operations and maintain momentum between meetings. Using these tools to encourage follow-through is a no-brainer in terms of bringing additional focus to honoring commitments.

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**Healthy, engaged boards follow through on commitments while unhealthy boards have no sense of accountability or follow-through.**

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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 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 Board Members

Don't be afraid to have difficult conversations with your other board members or the administrator. You can only develop trust in your peers 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 organization forward.

### 4. Volunteering

Not every organization needs its board members to volunteer in a traditional, boots-on-the-ground sense. While traditional volunteering doesn't naturally lend itself to some organizations' work, most mission-driven organizations want their board members to really understand what they're trying to accomplish on a tactical level.



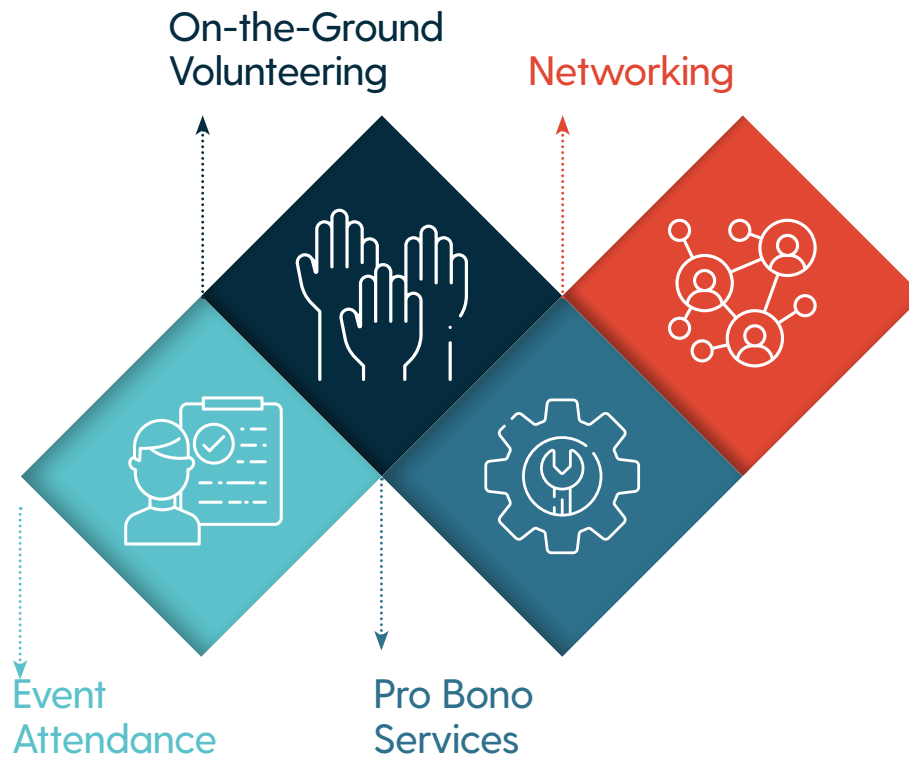
**Actively volunteering creates a connection that just going to board meetings might not.**



Doing the work to provide your board members with creative ways to volunteer and engage with your mission will help them understand the best ways to participate. Remember: a connected board is **an engaged and energized board**.

Being on a board is not all about simply showing up to events and mingling with potential investors – it's also about lending a hand at the food drive or community build. Beyond the traditional form of volunteering, this may also include:

- **Offering pro bono services.** Skills-based volunteering is a great way to leverage one's strengths for the betterment of the organization. Lawyers and other legal figureheads can offer their legal expertise, while those who work in finance can offer financial guidance.
- **Leveraging networks.** Professionals tend to have extensive networks which can be used to expand the organization's potential. Board members can offer up their connections to grow their organization's network, which can directly increase funding and awareness of the organization's presence.



While it's certainly possible to be a great board member without volunteering, this often-neglected tenet helps develop a deeper relationship between a board member and its organization. This ultimately can make them more personally invested in the decisions that are being made.



## Tips for Administrators

When you're setting expectations for new board members, include volunteering as a tenet alongside regular meeting attendance. You should be able to expect board members to attend different events and lend a helping hand whenever it's needed.





## Tips for 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 and offering your expertise help connect you to the why behind an organization's mission. Don't sit back and wait for the opportunity to present itself; ask your executive director or CEO how you can get involved.

## 5. Advocacy

By joining a board, members are making a public statement that they believe in the mission and value of an 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 your mission stands for.

Yet according to [BoardSource's Leading With Intent Report](#), chief executives and board chairs indicate that conducting outreach and acting as ambassadors for the organization are among the top three areas in need of board improvement.



Outreach and ambassadorship are among the top 3 areas in need of board improvement.

If board members fail to act as advocates and vocal supporters, it could be a sign that the engagement and initial excitement that once connected a board member to your organization aren't there anymore. Boards need to use this lack of engagement and advocacy as a teachable moment and get creative about reframing your board structure to refuel and invigorate members.



## Tips for Administrators

To ensure that your board members are fully engaged with your organization, keep track of different advocacy efforts (like social posts, emails, and word-of-mouth referrals) from different members. Then, assign everyone an 'advocacy score'. People are naturally competitive, so a touch of friendly competition will increase board members' engagement.



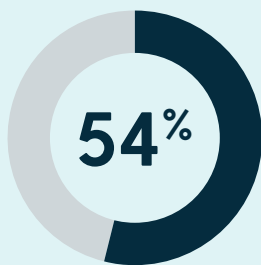
## Tips for Board Members

Advocacy is an essential responsibility of modern board members. Don't shy away from sharing the value of your organization with others. Leverage the promotional content your marketing team has already pulled together to share with your networks.

## 6. Attracting Funders

At the end of the day, attracting funders is as much a part of a board member's responsibilities as making leadership decisions or attending board meetings.

For organizations that rely on regular fundraising, board members' efforts were poised to be challenged in 2020. However, we found that 54% of survey respondents were on track to meet or exceed fundraising goals last year.



of board members were on track to meet or exceed fundraising goals despite the pandemic's challenges.

While certainly challenging, creating new strategies for board members to bring in revenue can be exciting. The pivot to virtual operations has allowed boards to connect with funders in new ways, both in their networks and not. The online realm enables them to interact with investors across the country (and even across the globe) using tactics such as:



Virtual Meetings



Social Media



Online Events



Email Marketing

Of course, an organization doesn't select its board solely based on connections or networks. But, knowing how to work this network is a key attribute to look for in board members.

Bear in mind that with the financial support they secure, board members also have a responsibility to keep the organization running efficiently, so shareholders don't lose the money they've invested.



## Tips for Administrators

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



## Tips for Board Members

Board members can always be more active in support asks to their employers, networks, and peers. Have a plan in place when interviewing for your board position for how you will capitalize on these networks down the road.

## 7. Personal Financial Investment

Most boards have some sort of giving policy in place for board members, yet many chairs and CEOs would like to see their board members more engaged and excited to make personal financial contributions.

While making financial contributions isn't always required, engaged and connected board members should want to help drive an organization toward success. A sign of a disconnected board member is a lack of financial investment. However, bear in mind that some board members may not be in a financially sound place to invest, in which case an expectation of contributions may be unreasonable.

With those who do contribute, it's critical to report back. Be proactive about showcasing how board members' financial contributions are driving change and reinforcing the mission statement of the organization that they decided to champion.



### Tips for Administrators

To motivate board members to invest more, show the difference they're making by keeping a digital scorecard that shows what percentage the board has given. 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 Board Members

Don't play dumb when it comes to contributing. As a board member, you should want to contribute time, talent, and financial support when possible. If you're not feeling personally motivated to contribute financially, it's your responsibility to work with your peers to find other ways to contribute outside of your regular board work.

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# Board Engagement Checklist

## 5 Things You Can Do To Actively Engage Your Board

- ✓ Leverage your digital resources to set board members up for success with **easy access to critical documents**, past **meeting minutes**, and any updates they need for real-time visibility. A dedicated solution like **Boardable** provides secure instant access to everything so that your board can virtually engage without any obstacles.
- ✓ Provide all board members (both new and tenured) with a clear list of expectations and guidelines that outline the requirements for preparation, attendance, follow-through, volunteering, advocacy, attracting funders, and investing.
- ✓ Create an online forum or communication channel where your board can share ideas and vote on any upcoming decisions to facilitate engagement.
- ✓ Keep your board members aware of any upcoming fundraising or marketing campaigns, volunteer opportunities, and one-off events that they can attend. Think outside of the box to meet these objectives in an evolving digital space.
- ✓ Build an **on-the-go toolkit** that board members can easily access from their smartphone or laptop to share key facts and figures with others about your organization's values and mission.



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# Conclusion

To fulfill and exceed their obligations to provide effective oversight, board members need to be willing to devote their time, energy, and resources to the institutions that they're charged with guiding. The only way they'll do that is if you fully enthrall them with their work.

Board engagement isn't something you should take lightly. It's a critical component that separates subpar boards from exceptional ones. The atmosphere you create has a direct effect on the finances, awareness, and general **sustainability of your organization**, so it only makes sense to give it the proper care and attention it deserves.

There aren't any shortcuts when it comes to developing a culture of enthusiasm among board members. Rather, it takes a calculated approach and a strong understanding of the individuals who serve on your board – something only an organization's CEO and board officers are capable of.

So what are you waiting for? Refine your engagement strategies and make the board experience the best it can possibly be!

# Are you ready to take board engagement to the next level?

Launch a digital transformation  
with Boardable.



# About Boardable

Boardable takes mission-critical board and committee meetings from friction to focus. Founded by experienced board executives, the intuitive board management platform brings teams together — wherever they are — so they can prepare, engage, and take action on what matters most. Boardable powers more than 2,000 organizations in over 40 countries, including associations, nonprofits, healthcare, higher education, and enterprise businesses. Learn more at [www.boardable.com](https://www.boardable.com).



# Boardable

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