



# Professionalizing the Nonprofit Board Experience



# Professionalizing the Nonprofit Board Experience

While nonprofit boards are staffed and managed by volunteers, nonprofits themselves are businesses. Boards are in place to help these businesses meet their goals, grow in the market, and attract new consumers or donors. Nonprofit boards can provide better clarity and guidance to nonprofits when they operate as a professional board.

Being a part of a modern nonprofit board goes beyond simply volunteering and advising. Boards should have clear expectations, guidelines, and resources for their members in order to help them do their jobs better. This comprehensive guide explores the role of the professional nonprofit board and dives deep into five ways nonprofits can help board members succeed, complete with actionable tips and tools.



# Introducing the Professional Nonprofit Board

There are many different reasons people join a nonprofit board: supporting a cause, networking, or wanting to pad a resume. All of your board members will have a different story. Nevertheless, a shared sense of purpose can take a hodgepodge group of people and turn them into an efficient, successful board. Understanding goals and building community will set a professional nonprofit board apart from the rest.

In a professional nonprofit board, board members have clear expectations for daily, monthly, quarterly, and long-term commitments. They take on roles and responsibilities within the board and committees that play to their unique talents and abilities, which makes them enthusiastic about participating and sharing ideas with their peers. Just as a great company hires employees who are energized and excited to come into the office, so too should a great board have board members who are ready and willing to give 110% to the cause.

Additionally, a professional board interacts transparently with its nonprofit. While board members should be ready and willing to help move a nonprofit's goals forward, a nonprofit team itself should be aware of and respectful of their board members' time and contributions. Strong cohesion takes a good board and makes it great.





# Is There Such a Thing as a Perfect Nonprofit Board?

In theory, yes. A perfect, professional nonprofit board:

- Has healthy, democratic conversations
- Manages financial risks
- Supports final decisions
- Avoids internal politics or drama
- Collaborates rather than competes with the nonprofit
- Integrates into the day-to-day operations of the nonprofit

Of course, achieving this perfect board status might seem difficult, but in reality, it's all about providing board members with the resources and content they need to be successful. Next, we'll run through the five tenets that make up the modern tool kit of a professional nonprofit board.







# 1. Intentional Experience

As nonprofits begin to operate more like businesses, nonprofit boards are starting to emulate a board-of-investors model. Just as a group of investors wants a company to do well for their own personal interests, so, too, should a nonprofit board want a nonprofit to succeed and hit its goals. Even though they are volunteers, board members share responsibility and accountability with a nonprofit. Understanding their reciprocal relationship with the nonprofit helps positively influence the overall board-member experience.

Being on a nonprofit board is more than just making connections or adding a new role to a LinkedIn profile. Once a person joins a board, they commit to advancing the financial success of a nonprofit organization. It can be difficult, however, for nonprofits to obtain buy-in from volunteers. This is where intentional role assignment comes into play. All board members should have a clear role that plays to their abilities and strengths. What can they bring to the table that nobody else can? What pursuit makes them feel as though they have real equity in the success of the nonprofit?

## EXERCISE

Build a process map for your board using the following questions to guide your framework. Ask your board members these questions to gauge feedback and help inform your process moving forward:

- **Why is the success of this nonprofit important to you?**
- **How could your strengths and abilities be best used on this board?**
- **What are the advantages and disadvantages of the current board process (meetings, decisions, messaging, etc.)?**





## 2. Technology

We're living in a thoroughly digital world, and expecting nonprofit boards to run their businesses on paper or with manual processes sets them up for failure. Nonprofits should give their boards modern, digital tool kits to help them streamline processes, expedite decision making, and seamlessly transition from board meetings to the real world. Gone are the days of passing out a 75+ page board book and expecting your board members to read and remember all of its content. Instead, nonprofits are turning to technology

to help create a more informed, more professional board experience.

Just as a business can't survive on manual processes, a board shouldn't be expected to operate this way either. If you expect your board to be able to make forward-thinking decisions that will influence the success of your nonprofit in the long run, then board members should have access to the most current content, data, and tools to make these decisions possible.

### EXERCISE

As you're researching or selecting a new tool for your nonprofit board, ask yourself the following questions to help make the right decision:

- Will this solution allow seamless integration with other tools or platforms members currently use?
- How do your board members want to communicate? You can take a short, informal survey during a board meeting to determine this.
- Can this solution integrate with popular calendar or notes apps?
- Is there a mobile application that can be accessed anywhere?



# 3. Structure

One of the biggest roadblocks standing in the way of boards becoming professional boards is the structure or hierarchy of nonprofit boards. There are three sub-categories here: the hierarchy of decision-making, committees and subcommittees, and meeting agendas.

Making decisions in a nonprofit board, especially a larger one, can be hard. The hierarchy of decisions, from subcommittee to committee to executive committee to general consensus, can be stilted and difficult if not done correctly. While hierarchies are in place for a reason (to create a structure of decision-making), if they are standing in the way of getting things done, then there is something wrong. Boards should be structured in the same way as the nonprofit itself, so it is balanced with the needs of the organization. Hierarchical decision-making shouldn't slow things down—it should speed things up.

Every board should have committees, and every single board member should be a part of at least one committee. Just as companies have departments,

boards have committees. Each committee has a purpose and a role, and every committee member should feel like they bring something to the table. Additionally, each committee or subcommittee has different metrics for success, different goals and milestones to which they are held accountable, a specific internal hierarchy of decision-making, and even specific agendas for meetings. The structure of committees and subcommittees should mirror the structure of the larger board for maximum efficiency.

And finally, the agenda. The quickest way to derail a nonprofit board and sow seeds of discord among board members is with a poorly planned meeting agenda. Board meetings require tactfully managed conversations to ensure that a single person doesn't dominate the conversation, that everyone is able to speak up and share ideas, and that all critical agenda items are addressed and resolved. A great idea here is to send out the agenda to your board well in advance to ensure everyone has the opportunity to prepare for discussion.

## EXERCISE

Building a nonprofit board structure is important because it will influence the way decisions are made and, eventually, how your nonprofit itself operates on a foundational level. Create your board structure by first mapping out the decision-making hierarchy of the board. Next, sketch out different committees and subcommittees required by your cause. Then, create a hierarchy within these smaller groups as they relate to the larger board. And finally, build a meeting expectations document that outlines what board members should—and shouldn't—bring to the table during group meetings. Having this document prepared and available will help ensure efficiency across the board.





# 4. Communication

Keeping your board members informed and up-to-date is critical, but there are often problems with nonprofit boards and communication. There is definitely such a thing as over communicating when it comes to nonprofit boards, and between nonprofit messaging, committee notices, and board announcements, it's easy to go overboard on communication. That said, there are three components of communication to keep in mind to create a professional board experience:

**Timelines:** How often is too often? Build a communication calendar for all groups (your nonprofit, committees, and board) to ensure that nobody receives too much or too little communication. Check out the exercise below for more best practices on creating a communication calendar.

**Channel:** How are you sending these messages? While email is a tried-and-true method of communication, many modern boards are turning to more innovative, professional channels for updates. Nonprofit-specific platforms, like Boardable, make it easy to send quick updates without flooding inboxes.

**Type:** What are you actually sending? Nonprofit board members require a ton of content to do their jobs. From meeting notes and next steps to reports and financial updates, there is no shortage of information to be shared. Provide your board members with a single repository for all notes, reports, and content for a truly modern board experience.



## EXERCISE

In order to provide board members with the best possible communication experience, keep these best practices in mind:

- Find a communication template to ensure boards, committees, and subcommittees are using the same best practices.
- Survey the board regularly on how they want to receive communications to ensure you're staying on top of preferences.
- Send any critical documents and content to your board at least a week in advance of a board meeting or call to give them sufficient time to review.



## 5. Continuity

If you're building a professional nonprofit board that looks and operates like a successful business, then recording and archiving content is a must. The best boards are those that keep thorough records of content, data, and information to avoid any continuity issues that might arise. This is especially helpful when onboarding new board members or promoting board members to new positions. Having access to past meeting minutes, documents, and best practice templates can smooth these processes and get new members up to speed quickly.

Another critical tenet of success is business continuity. Nonprofit boards should always have someone available to be next in line for specific roles and positions within the board. Long-term thinking and planning for contingencies are clear signs of a professional board. Set up an internal pipeline by assigning a Vice-Chair or Vice-Secretary that are ready to fill positions should they come available.

### EXERCISE

Recruiting board members doesn't have to be hard. Instead of simply asking current board members for recommendations, use the following suggestions to find the perfect additions to your nonprofit board:

- **Always be looking for new potential board members from large corporate sponsors, individual donor groups, and other community leaders.**
- **Stay engaged with potential board members even if there isn't an open board position by including them in any events and/or nonprofit messaging.**
- **Work with your board to build a wish list of potential board members in case of an unexpected opening.**
- **Be transparent with your current board members about an internal pipeline of promotion.**



# 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 14-day trial, visit us at **[boardable.com](https://boardable.com)**.



Copyright © 2019 Board Management Software, Inc. All rights reserved.

Any reproduction, modification, distribution, transmission, publication, translation, display, hosting or sale of all or any portion of the contents of this document is strictly prohibited without written permission of an authorized representative of the publisher.