

**ENGAGED**

— AND —

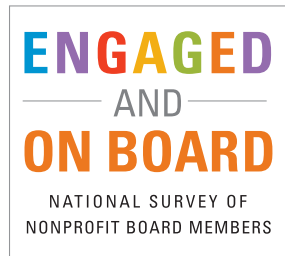
**ON BOARD**

NATIONAL SURVEY OF  
NONPROFIT BOARD MEMBERS



COMMUNICATIONS

Elizabeth Bailey  
Nancy Schmidt



## ENGAGED AND ON BOARD

***When it comes to board engagement, the board environment and experience that an organization delivers plays a more significant role than many nonprofits realize.***

Nonprofit leaders know from research and firsthand experience that highly engaged board members are critical to their organizations. Engaged board members inject energy and enthusiasm into strategic vision and leadership, bring expertise, foster connections and challenge themselves to raise needed funds and resources. While it certainly makes sense for nonprofit leaders to take a serious look at whether they have the “right people” on their board, it is also highly probable that some current board members have untapped potential. This 2015 study, *Engaged and On Board*, by 2B Communications, offers insight and guidance to nonprofit leaders as they work to enhance the engagement and effectiveness of their board members.

### **A New Way to Look at the Issue of Board Engagement**

***Highly engaged board members help show the way.***

The issue of unengaged board members may not come as news to nonprofit leaders or board members, but it does raise a fundamental question: What to do about it?

This study takes a fresh look at board engagement through the lens of board members who are highly engaged. It focuses on identifying how these individuals personally benefit from their board service, and the aspects of their board cultures and practices that they perceive to be “excellent.” The findings offer executive directors and other nonprofit leaders insights into the ways they can assess their own boards and create a board experience that maximizes the engagement of all members.

The study, which is based on the survey responses of 1,215 nonprofit board members from across the United States, employs the Net Promoter System to identify differing levels of engagement. This metric, developed by the Bain Consulting Group, is well established in the private sector, and is increasingly being applied to the social change sector. It uses a single, core question to categorize survey respondents into one of three categories: “Promoters,” who actively recommend a product, service or organization to friends and colleagues; “Passives,” who may be satisfied but are not strongly invested; and “Detractors,” who have a negative experience or perception.

Their responses are enlightening. They also make it clear that there is work to be done to build the engagement and capacity of many nonprofit boards. Our intent is that these findings will inform and encourage the efforts of nonprofit leaders and support their success.

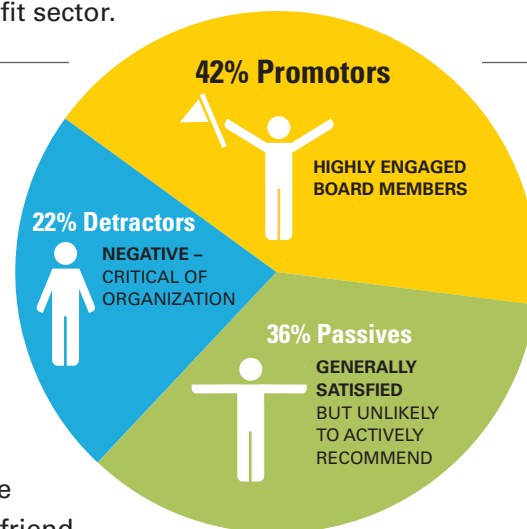
### About the survey

A national survey of 1,215 board members of nonprofit organizations was conducted online during July 2015. It was fielded using a research panel maintained by Research Now, a nonpartisan, international opinion research firm. Respondents were grouped using an adapted version of the Bain Consulting Group Net Promoter Core Question: **“On a scale of 0-10, how likely are you to recommend serving on your board to a friend or colleague?”** Applying the Bain methodology, those who responded with 9 or 10 were categorized as “Promoters.” Those who responded 7 or 8 were categorized as “Passives,” and those at 6 or less as “Detractors. All respondents were then asked a series of questions about their personal board experience, and then were asked to rate their board’s culture and practices. The survey was designed by 2B Communications, an independent consulting firm with extensive experience working in the nonprofit sector.

**On a scale of 0-10, how likely are you to recommend serving on your board to a friend or colleague?**

### A Wake-up Call for Nonprofit Leaders

***Your board members may not be your best ambassadors.***



Responses to the core question, “How likely are you to recommend serving on your board to a friend or colleague?” were used to assign respondents to different categories of engagement. The answers signal a wake-up call for nonprofit leaders. Less than half of board members, just 42%, are likely to actively recommend serving on their board. Another 36% of board members are generally satisfied but are not likely to actively promote board membership; and 22% are having negative experiences that actually make them likely to be critical of the organization to others. The implications of this finding are notable given the role that board members are expected to play in helping to identify and recruit other board members as well as raise awareness and support for the organizations they serve.

***The good news for nonprofit leaders: Board engagement is not completely outside your control.*** Respondents’ replies to the core question revealed virtually no demographic differences between “Promoters,” who are highly engaged, and “Passives,” who are not. This supports the idea that an individual’s decision to engage is not simply a function of their inherent characteristics; rather, it is at least in part situational. That is, the way members experience their board’s culture and practices motivates them to become either more or less involved.

## KEY FINDINGS FROM THE SURVEY

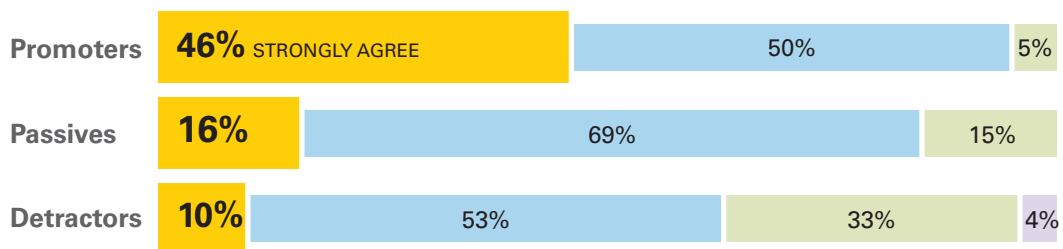
### Highly engaged board members are having a very different experience than their more passive colleagues.

It comes as no surprise that highly engaged board members hold more positive attitudes about their board experience and their boards’ culture and practices. And it should be noted that overall, most board members report a generally positive experience. What is striking is the **size of the gap** between the percentage of highly engaged board members who feel strongly positive compared with their less engaged counterparts. In many cases, engaged board members are **twice as likely** to be strongly positive, a very notable difference.

#### Some highlights:

- **Engaged members are more likely to feel that their board experience exceeds their expectations.** 46% percent of “Promoters” strongly agree that their experience exceeds their expectations, as compared to just 16% of “Passive” board members.

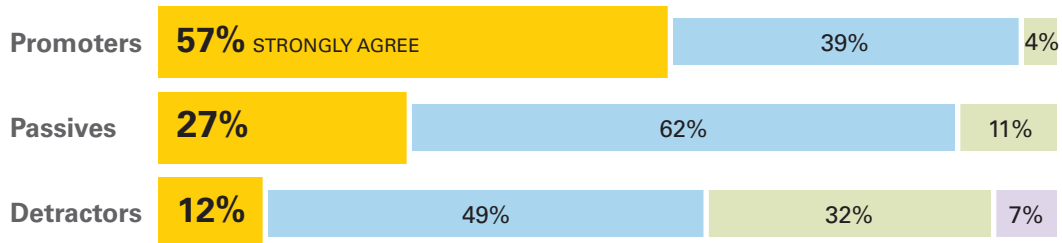
#### Being a board member has been a better experience than I imagined.



■ STRONGLY AGREE   
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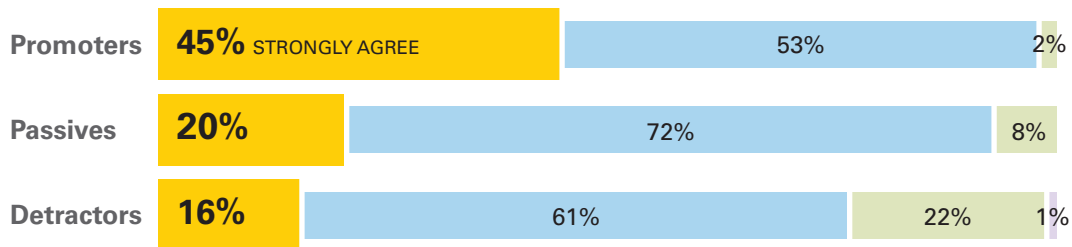
- **Highly engaged board members are also more than twice as likely to say they would like to continue serving for another term on their nonprofit boards.** 57% percent of “Promoters” strongly agree compared to just 27% of “Passive” board members.

**If possible, I would serve an additional term on this board.**



- **There is room for improvement for all board members.** Echoing the concern commonly voiced by nonprofit leaders that their boards are ineffective, it is worth noting that even among highly engaged board members, **fewer than half** (46%) strongly agree that they are highly effective in their roles.

**I am a highly effective board member.**



■ STRONGLY AGREE   
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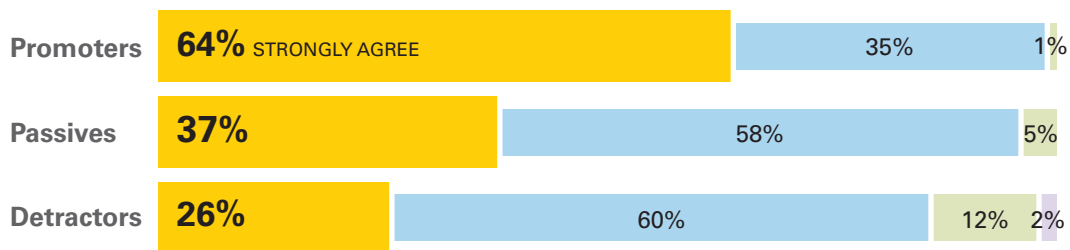
## A Closer Look at the Benefits of Board Service

As expected, those board members who are considered “Promoters” are more engaged overall. But how are they personally benefiting from their board service? What are the characteristics of their board culture and practices that make them feel that way?

Board service delivers unique and meaningful benefits to engaged members.

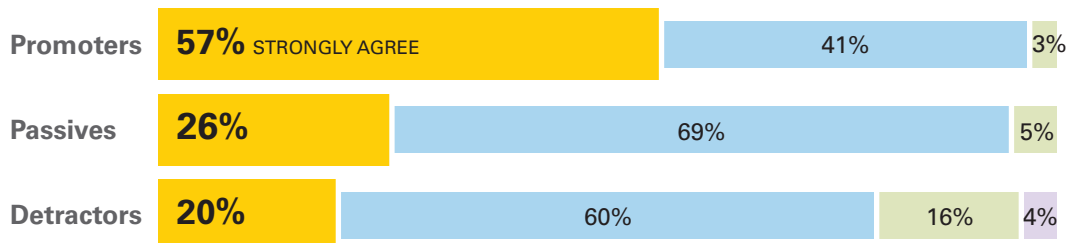
- **Building relationships rises to the top as the value that the largest number of engaged members gain from their participation.** Board members who are highly engaged are much more likely to say they have established important new relationships than those who are less engaged. 64% percent of “Promoters” say they have made important new relationships, while only 37% of “Passive” board members say so.

**I have made important new relationships through my board service.**



- **Engaged board members are much more likely to report that their board service has resulted in new skills.** “Promoters” are more than twice as likely to strongly agree that they have gained new skills through board service – 57% vs. 26%.

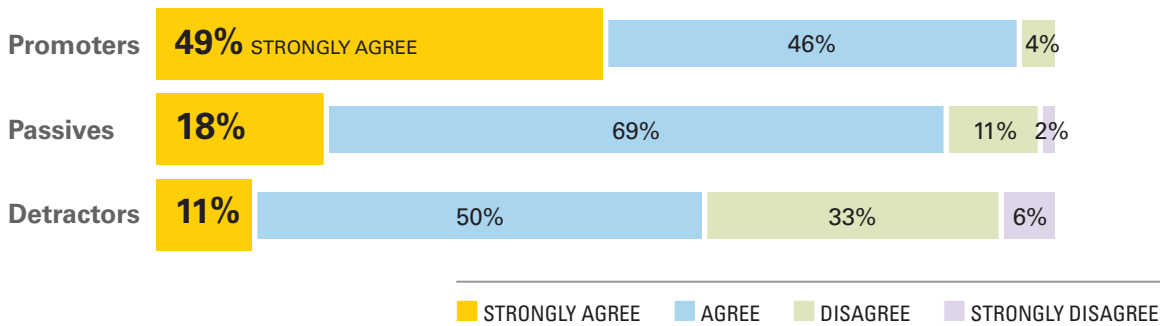
**I have gained new skills through my board service.**



■ STRONGLY AGREE   
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- **Board service is seen as the most meaningful way to make a difference by engaged board members.** Highly engaged board members are much more likely to feel that their board participation helps them to make a greater impact than other volunteer opportunities. 49% percent of “Promoters” strongly agree that that this is the way to make the biggest impact, while only 18% of “Passives” say the same.

**I am making a bigger impact as a board member than I could through other types of volunteering.**



**Highly engaged board members view their boards as excellent in key areas.**

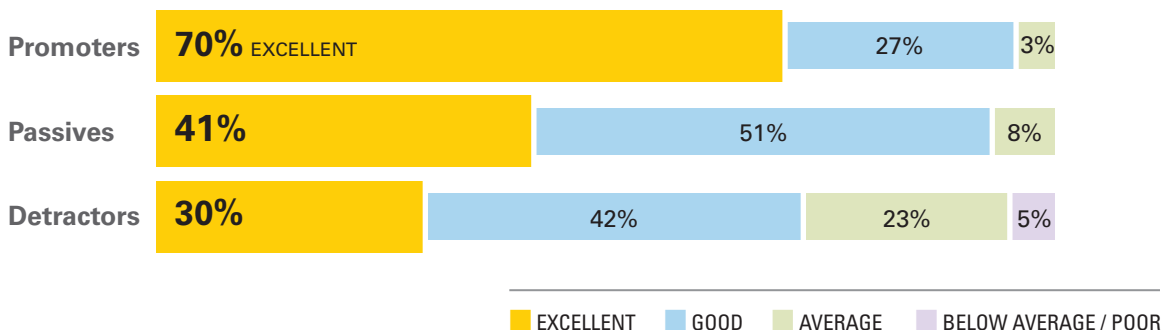
Compared to their less engaged colleagues, highly engaged board members view their boards as **excellent much more frequently** than their less engaged colleagues in terms of commitment to the mission, understanding their roles and their boards’ practices, culture and mindset.

**Board Member Commitment and Understanding**

Highly engaged board members appear to be much more likely to serve on boards that they perceive as excellent in two fundamental areas: being committed to the organization’s mission and being clear about board roles and responsibilities.

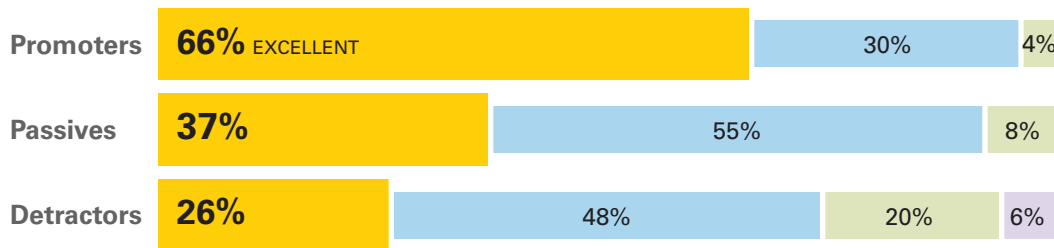
- **70% of “Promoters” are likely to rate their boards’ understanding and commitment to mission and programs as excellent.** Less than half of “Passives” (41%) say the same.”

**Our board fully understands and is strongly committed to our organization’s mission and programs.**



- By a wide margin, highly engaged board members are also more likely to say that their boards are excellent in terms of **knowing and agreeing on their roles and responsibilities and actively engaging in discussions around significant issues.**

**Our board knows and agrees on what our board roles and responsibilities are.**

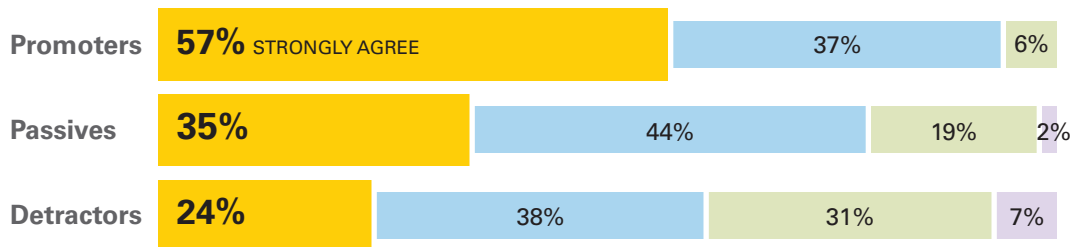


**Board Practices**

The practices of organizations also appear to matter to board members. Those members who feel positively about such issues as attendance at meetings, involvement in strategic planning and effective communication with staff are more likely to be more positive about their board experiences.

- **57% of “Promoters” give excellent ratings to their board’s engagement, attendance at meetings and participation in committees.** By comparison, just over one-third (35%) of “Passive” board members say the same.

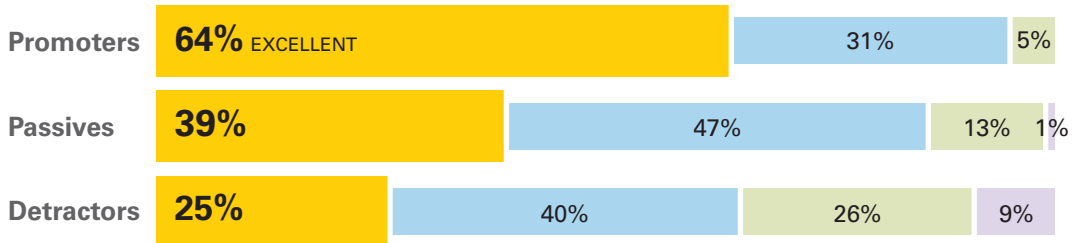
**Our board is engaged, attends board meetings and participates on committees as appropriate.**



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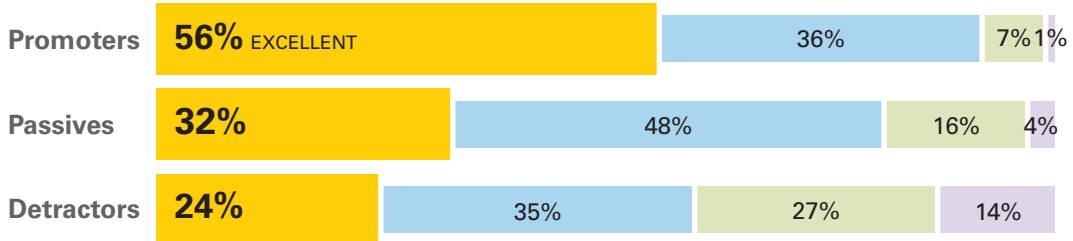


**Board members actively engage in productive discussions around significant issues.**

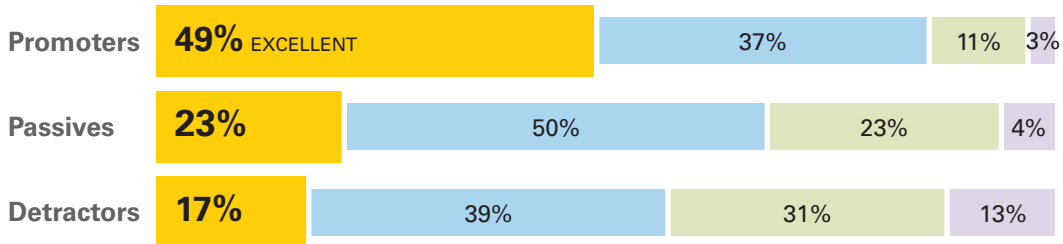


- Promoters are also more likely to give higher marks to their board’s **involvement in strategic planning for their organization**. More than half of “Promoters” (56%) rate their board’s participation in strategic planning as excellent. Just 32 % of “Passive” board members give an excellent rating to their board’s involvement. They also regularly monitor and evaluate progress toward their organization’s strategic goals.

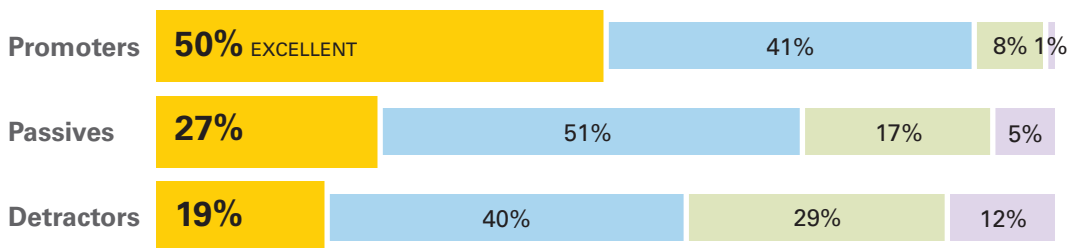
**Our board has participated in developing our organization’s strategic plan.**



**Our board regularly monitors and evaluates progress toward our organization's strategic goals.**

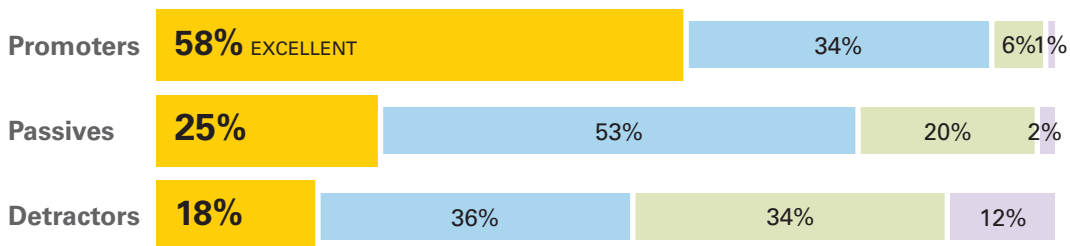


**We have set clear goals and actions for how we as a board will support our organization's strategic plan.**



- When it comes to **communicating and working productively with staff**, there are significant differences between highly engaged board members and their colleagues. More than twice as many “Promoters” (58%) rated their board’s communication and work with staff as excellent. By comparison, just 25% of “Passives” said the same.

**We communicate clearly and work productively with staff.**



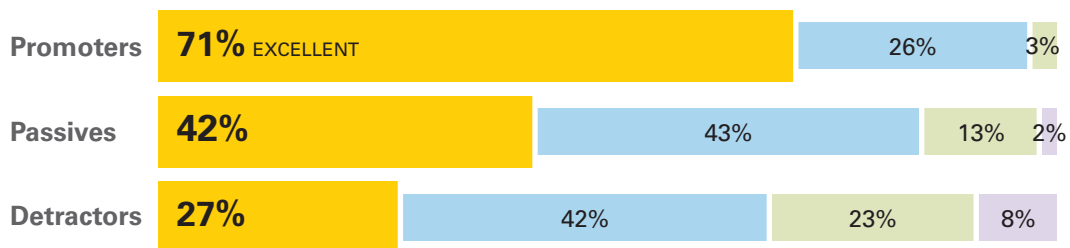
EXCELLENT GOOD AVERAGE BELOW AVERAGE / POOR

## Board Culture and Mindset

The culture and mindset of nonprofit organizations also appear to be important in shaping board members' views. In one of the survey's strongest findings, nearly three-quarters of "Promoters" give top ratings to their board culture. And more than half feel their boards are action-oriented.

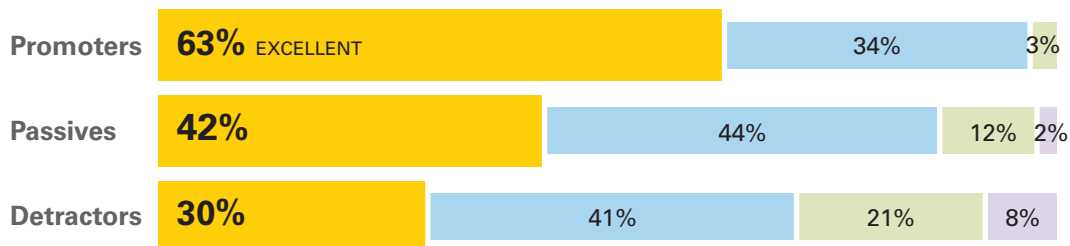
- "Promoters" much more often view their board's culture as **open, inclusive and welcoming**, with 71% giving their organization a rating of "excellent" in this area. Just 42% of "Passive" board members concur.

**Our board has a culture that is open, inclusive and welcoming, in which our board members' opinions are heard and respected.**



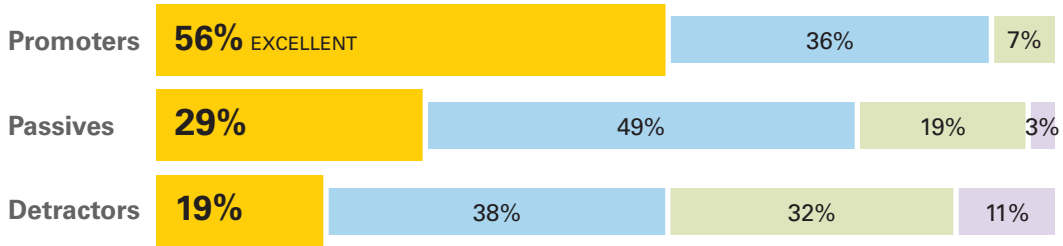
- Highly engaged board members are also more likely to feel that their **members enjoy and appreciate each other**, with nearly two-thirds (63%) rating relations among board members as excellent.

**Our board members enjoy and appreciate each other.**



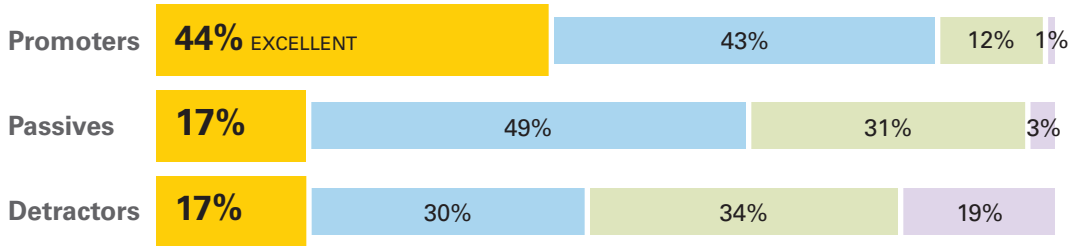
■ **Promoters view their board as action-oriented.** More “Promoters,” 56%, rate their boards highly for being “doers” who make things happen. Just 29% of “Passives” feel the same.

**We are “doers” who make things happen.**

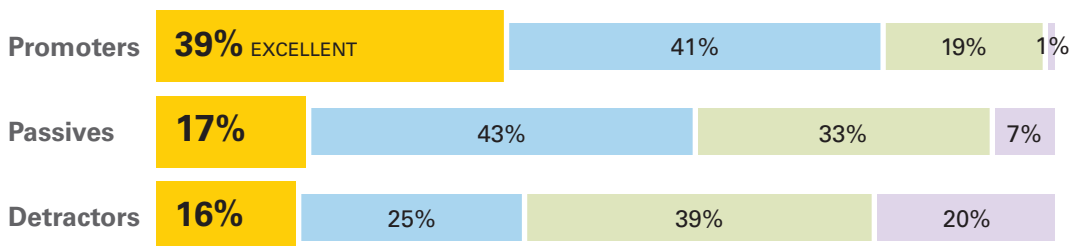


■ **Promoters also rate their boards comparatively higher for vision and boldness.** 44% of highly engaged board members view their boards as excellent in terms of being “visionary”; while just 17% of “Passive” board members say so. **Boldness** garners lower marks from all board members, although “Promoters” are still more than twice as likely than “Passives” to rate their boards as excellent on this measure, 39% to 17%.

**We are visionary.**



**We are bold.**



■ EXCELLENT ■ GOOD ■ AVERAGE ■ BELOW AVERAGE / POOR

### Younger board members offer important insights.

*Some of the most positive news from the study is that “Promoters” under the age of 40 are even more strongly positive than their older “Promoter” counterparts in some key areas.*



#### Under 40s:

- are much more likely to view board service as the way to **make a bigger impact than other types of volunteering** (64% of younger promoters strongly agree vs. 44% of older promoters).
- are much more likely to say they have **gained new skills** (71% of younger promoters strongly agree vs. 52% of older promoters).
- are more likely to find their board experience to be **better than they imagined** (54% vs. 43%).
- **have a bolder mindset:** Promoters under the age of 40 are much more likely to strongly agree that “Our board is bold” – 57% vs. only 33% of older promoters.

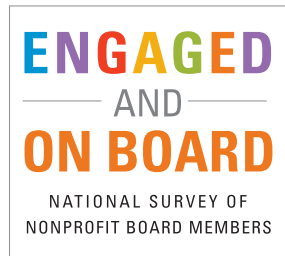
## IMPLICATIONS FOR NONPROFIT LEADERS

***Engaged and On Board* provides nonprofit leaders with fresh insights into how to achieve a more engaged, higher-performing board.**

By gaining a better understanding of where highly engaged board members derive personal benefits from their board service, along with the board characteristics and practices that they consider to be excellent, organizations can develop more effective board assessment, engagement and capacity-building plans and activities.

**It’s common sense that success starts with being able to recruit high-quality board members. Given the competition for truly capable people, organizations that can deliver on an excellent board experience will have an advantage and can build a much more compelling case for board service.**

**It is equally important for nonprofit leaders to get the most out of the board members they already have by creating an environment that stimulates higher levels of engagement.**



This study validates and provides insights into some specific areas that contribute to an organization’s overall success. There are a number of questions and actions that organizations may want to consider to increase their board members’ engagement and their board’s overall performance:

**Conduct a well-rounded board self-assessment**

Implementing an annual board self-assessment process that encompasses the board member’s personal experience, along with board practices, culture and dynamics, can yield highly useful insights that will help organizations focus their board activities on the areas that will make the greatest difference.

**Be mindful of members’ personal motivations**

- Building relationships is the most valued personal benefit of highly engaged board members. This suggests that organizations can benefit from taking a thoughtful approach to how they are helping to facilitate an inclusive board culture in which people get to know, enjoy and appreciate each other.

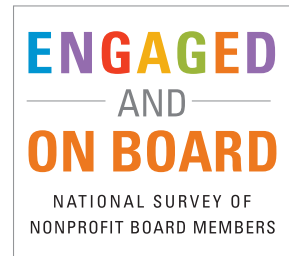
*Questions organizations can ask:*

- ✓ How are we evaluating whether a potential board member will be a good “fit”?
- ✓ How do we get to know our own board members to maximize our understanding of their interests, talents and areas of expertise?
- ✓ How do we introduce board members to each other and help them find areas of common interest?
- ✓ How do we facilitate relationship-building inside and outside the boardroom in a sustained and meaningful way?
- ✓ Are there any problematic dynamics between new and old members, different ages, genders, ethnicities, etc. that need to be addressed?

- Engaged board members also place high value on gaining new skills. And they recognize that there is room for improvement in terms of their personal effectiveness in their board role. Younger board members are especially enthusiastic about the new skills they learn through their board service.

*Questions organizations can ask:*

- ✓ What skills are most needed/desired by our board members?
- ✓ Do our board trainings deliver “how-to” skills or just skim the surface?
- ✓ Do we employ a “one-and-done” approach to board skills development, or do we take a longer-term view that builds their confidence and continues to refine their skills?
- ✓ Are we using our board training and leadership development program as a competitive advantage when we’re recruiting new board members?



- Highly engaged board members believe they are making a bigger impact by serving on a board than they could achieve through other types of volunteering.

***Questions organizations can ask:***

- ✓ How are we strengthening the connection between what our board members do and the difference they are making? (e.g., Do our individual board members identify and commit to their own personal “points of impact” each year?)
- ✓ How are we recognizing board members for their individual commitment and contributions?
- ✓ How are we reinforcing and educating our board on the individual impact that they are making, in addition to the impact being made by the organization as a whole?

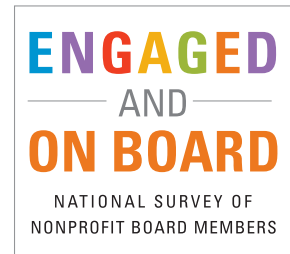
## **Strive for Excellence**

- Engaged members tend to serve on boards that they view as excellent in terms of being mission-focused and being clear about their roles and responsibilities. They are also seeking opportunities for active participation, engagement in strategic planning and regularly assessing their organization’s progress.

***Questions organizations can ask:***

- ✓ How are we orienting and onboarding our board members?
- ✓ What processes do we have in place to promote attendance and participation on committees?
- ✓ How are we involving our board in strategic planning?
- ✓ What mechanisms are in place to report progress against the plan?
- ✓ How do we construct our board meetings so that they not only cover the business of the organization but also serve to educate and inspire?

While there is no silver bullet to engagement, this survey makes clear that what board members are experiencing — in terms of the culture and practices of their board — plays a major role in influencing how actively they will engage and act as “promoters” for the organization. The good news is that there is much that organizations can do to set the stage and help facilitate higher levels of board engagement.



## ABOUT 2B COMMUNICATIONS

2B Communications is an independent consulting firm that helps nonprofit organizations achieve new levels of engagement, impact and excellence.

Our work over the past 25+ years has taken us inside organizations and professional associations across the nonprofit spectrum in nearly every part of the country. These collaborations have provided us with extensive, real-world knowledge of both the pitfalls that can cause nonprofit organizations to stumble and the cultures and practices that help them soar.

We've seen time and again how innovative problem-solving and growth come from gathering and evaluating data in ways that go beyond the obvious to reveal new insights and perspectives. We have had the opportunity to conduct qualitative and quantitative research studies, develop and help execute strategic growth plans, and design and implement comprehensive branding, marketing and new signature programs for more than a hundred organizations. These hands-on experiences have shaped the ideas and solutions we bring to the social sector and its business and government partners.

*"Engaged and On Board"* is one component of our ongoing efforts to help nonprofit leaders to lead more effectively. The study was overseen by 2B Co-Founder and Principal, Elizabeth Bailey and 2B Principal for Research and Strategy, Nancy Schmidt.

Learn more about 2B's work and our team of strategists, researchers, creative and technology professionals at [2bcommunications.com](https://2bcommunications.com)