

10 Tips for Engaging Your Board

It's really the staff's job to position the board to do their best work—and most of that boils down to excellent communication and clarity of expectations

BY DON LEE

“My board won't do what I need them to do.”

That's the complaint Lori L. Jacobwith says she has encountered the most often in more than 25 years as a Twin Cities-based communication strategist and fundraising coach. And when she hears grumbling like that, Jacobwith knows she's dealing with a board that's not engaged. By her definition, “An engaged board member shows up and does what they said they would do. It's that simple.”

When Jacobwith hears this complaint, she turns the tables: “I say back, ‘What have you told your board and how have they decided to help you in your fund development process?’” The organization has a responsibility, she says, “to create an environment where a board member will know, ‘What is your expectation of me and what should I expect in return?’”

In other words, staffers must own the responsibility of engaging the board—their bosses. “There's a really interesting dance that has to happen when you are managing up,” Jacobwith acknowledges, “when you are managing others who really have a say in whether you have a job or not. People who do it really well understand that their job is to be cheerleader and guide and trainer. There are different hats that you wear at different times. A really good team leader is someone who accesses the strengths of the board *and* the staff to get the whole job done.”

Jacobwith sums up the board-staff relationship like this: “I believe it is 100 percent staff responsibility for helping the board be great, and I believe it is 100 percent board responsibility to do what they said they were going to do. When both are happening, there's no finger pointing, there's always money coming in and answers to questions. There's just an engaged environment.”

The most common mistake nonprofits make, Jacobwith says, is to believe they are communicating what they want from board members, when in reality they are not being clear about expectations. Leading the list of Jacobwith's 10 tips on board engagement is her response to that tendency.

1 Be clear about what you expect the board to do.

Jacobwith advises both board and staff to think about the board's overall responsibilities—mission, strategic planning, fiscal oversight, fundraising, etc.—and then create a menu of the organization's needs. Use that, a board engagement agreement, and other written tools to ensure that board members meet their responsibilities. The process starts with recruitment and orientation. “If approving financials, reviewing the CEO's performance, and setting strategic vision are all priorities, spell that out in the process of recruiting,” she says.

2 Determine what's missing in board communication.

Jacobwith says she adores her doctor because at the end of each visit he makes sure to ask, “What are we not talking about that we should be?” An “aha moment” for many boards, she's found, comes when they realize they haven't talked about their role in raising awareness and raising money. “Some pretty amazing conversations” can happen, she's learned. “I've been to many sessions when the board will say, ‘We're not being used to full capacity.’” When that happens, says Jacobwith, “the staff's eyes bug out” because they assumed they had already asked enough of the board.

3 Don't expect each board member to act on every board responsibility.

This is another common mistake, says Jacobwith. “Each board member brings his or her own perspective, time constraints, and skills. To use everyone's gifts well takes planning and conversation.”

For one thing, Jacobwith sees no need for every board member to ask for gifts. There's more to development than fundraising, she says, citing the Association of Fundraising Professionals, which defines development as “the total process by which an organization increases public understanding of its mission and acquires financial support for its programs.” Jacobwith points out that board members can serve the cause by being ambassadors, recruiting new members, or raising awareness for the organization. They can make calls to thank recent happy donors. “What I tell people is, it takes a village to do development.” ▶



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has to happen when you are managing up, when you are managing others who really have a say in whether you have a job or not. People who do it really well understand that their job is to be cheerleader and guide and trainer.”

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4 Be clear about what absolutely has to happen.

When she offers this advice, Jacobwith is thinking especially of small organizations. “I’ve been the only staff person three different times at small shops, with boards that had been around awhile. They had unbelievable expectations. It would have been impossible to do it all, so I had to get really clear about what tasks had to happen and what I needed their help with. Making sure to thank donors is always at the top.” Have a to-do list ready for board meetings, she says, and parcel out the tasks.

As Jacobwith is well aware, that approach doesn’t always work—especially at first. “I hear a comment often from small organizations, ‘I give them tasks but they’re not doing what I’m asking.’” Jacobwith’s response? “Inactivity is usually about not knowing how to do it or understanding how important it is to the bigger picture. So take the time to explain.”

5 Equip board members to shine.

According to Jacobwith, the secret to fundraising is clear, bold communication. In order to be bold, and in order to be effective ambassadors, board members must know the organization, which means staffers must be strategic about channeling information to them. “In addition to providing charts and graphs, it means sharing anecdotal stories connecting the board to people and data so they can take action,” says Jacobwith. “The truth is, it takes slowing down a little to figure out what I need the board to know for them to help me shift the number of tickets sold or increase giving.”

Don’t underestimate the importance of visual displays, Jacobwith counsels—the charts, graphs, and pictures of people in your stories. As a primary way people learn, compelling storytelling makes a significant difference, and the stories donors eventually hear take shape in communication between the staff and the board. “Meetings are like a performance,” Jacobwith says. “The communication needs to be interesting. My responsibility is to provide as much information as possible as clearly as possible, and look for ways to make it fun. If I go to a meeting and I’m bored in the first 10 minutes, I usually find a way not to go

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back. So, how do we make sharing the less sexy data as interesting as the guest artist next month?”

6 Don’t be afraid to talk about the “funding gap.”

Surprisingly often in Jacobwith’s experience, board members are not accustomed to discussing whether revenue is keeping pace with expenses. She says sharing timely financial news, whether it’s good or bad, treats board members like insiders—which of course they are. She advises staff to bring up the funding gap (“where we are today vs. where we need to end the year with our fundraising”) at every board meeting. Underscore its importance in the broad context of the mission and point to the impact it will have on specific programs. Equipped with all of that, board members will be in a better position to explain “how money given can bring joy.”

7 Identify key board members who can be your partners.

Although she believes planning a meeting ought to be like staging a performance, Jacobwith is not insisting that staff take center stage. That role, she says, is often better handled by a board member: a partner who delivers “the front-of-the-house message.” In that scenario, the staff team leader is more like a conductor working from the orchestra pit. Playing that part well means “identifying key voices on the board to take the data and share it...two or three partners who can help make this performance valuable for people’s time.” The trick, she says, is knowing the organization’s most important needs and “marrying” each task to the right person.

8 To choruses: Tell your singers about opportunities to get more involved.

For choruses, singers represent a potent resource, a resource of a kind that few other nonprofits can claim. “The common denominator for people helping an organization succeed is passion,” says Jacobwith. “If I’m a singer, my passion quotient is really high.” But more than once she’s had to beg choruses to invite their singers to do more than rehearse and perform. “There’s a holding back,” she finds, as if to say: “We don’t want the singers to worry about the budget, so we don’t want to talk about the funding gap.” Jacobwith understands the concern. But, she says, not everyone will see this kind of information-sharing as a burden or obligation; some singers appreciate knowing there are additional ways to participate. In a larger sense, Jacobwith believes it’s important that “everyone in the community understand what it takes to deliver your art each year.”

9 Have a conversation about accountability.

Once the board’s duties and responsibilities have been spelled out, members must commit to them. Establish a dashboard or some other means of monitoring performance and holding members accountable. Annual elections and term limits are other ways to create a structure for accountability. “Inviting someone to move off the board and have that seat open up is an okay thing,” Jacobwith says.

Creating a culture of accountability is one area where board partnerships are especially important. “Accountability tends to be a scary topic,” she concedes, “because staff is working for the board.” The way through that, she says, is to work with board members to focus accountability on positive reinforcement. In other words, she says, “Reward exactly the behavior that you’re looking for. I worked with one group that had a big sash someone would wear for doing a task they said they’d do at the last meeting. It’s being playful with the acknowledgment in a way that really does get your community to act in the way that you need and want them to.” This particular recommendation, Jacobwith says, is “the part I would shout from rooftops. When you reward behavior, you get more of that.” ▶

10 To board members: Don't hold back.

“To really be clear, all of this is about communication,” Jacobwith says. Although she focuses on staff communication to the board, she tells board members they can't simply sit back and wait for an invitation to engage. If they feel their time is not being used well, they ought to tell the board chair and staff about the skills they'd like to bring to the table. Similarly, she tells board members to use meeting time to remind each other of promises they've made: “If we said we were going to be responsible for donor acknowledgement from here on out, then we really need to take it on and do it to its fullest.” Especially critical, says Jacobwith, are the conversations between new and standing board members during the orientation process. “If I see I'm joining a board that has not clearly spelled out how the board should participate in fund development, in raising awareness, I believe it's my responsibility to ask those questions, to help bring those tools to the table.”

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When an organization has failed to articulate board responsibilities, the reason is often “a capacity issue,” Jacobwith says. As she acknowledges, equipping the board to shine can be a big stretch for the organization staff. “That takes some thoughtfulness—some planning and conversation. For most groups, especially small organizations, it almost feels like an impossibility.” So what then? Jacobwith has a practical response: Consider the alternative. Without planning and communication, she says, “You'll create an environment that doesn't meet everybody's expectations.” She also has an emotional response: Tap into the passion you and the board feel for the organization's mission. “Knowing that something has to be different doesn't cause change alone; you have to be emotionally invested in it, too.”

In her 25+ years of experience, Jacobwith says she has worked with “amazing” boards who volunteer to do far more than they're asked. Attaining that level of board engagement may take time and planning but the payoff is well worth it. “It may not all happen overnight, but more money gets raised, awareness of your organization grows, and an environment is created that causes board members to feel terrific about their time of service.” ■

These tips on engaging your board are drawn from a presentation by communications and fundraising strategist and trainer Lori L Jacobwith at Chorus America's 35th Annual Conference in Minneapolis, and a follow-up interview. Slides and handouts from her session are available on the Chorus America website: www.chorusamerica.org/conf2012/session-resources

Jacobwith brings 25 years of professional speaking, coaching, and training to her work with social profit organizations. She has served as a development director, executive director, and president/CEO for various organizations, and has provided training and coaching for many organizations and their boards nationwide. Learn more at www.lorijacobwith.com.

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