

Arts Management &
Technology Laboratory

COMPUTER SOFTWARE AND ONLINE TECHNOLOGIES TO DEEPEN AND GROW BOARD ENGAGEMENT

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June 2014

A Research Center of



Carnegie Mellon University



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INTRODUCTION

How can an arts organization keep its board active and engaged? That question is as old as the institution of the board itself. It is important that the board is a collective, working together as a unified body to solve the issues of the organization. Jan Masoaka [writes](#), “Don’t just be a bunch of really great board members. Be a board that sees itself as more than just 1+1+... When a board has a sense of itself as a body, it will take the time to be sure that it has the information and relationships to act as a body, and be more prepared for holding the organization accountable to its constituencies,” (Board Café). It is important that arts organizations identify and take care of issues preventing full board engagement.

For many arts organizations, the board meeting is one of the only facets of board engagement that receives attention. However, it is difficult for board members to connect with the activities of the organization merely by attending quarterly meetings in sterile rooms. Curtis Chang [argues](#), “Dull board meetings suck out...life-giving air at the very top. The board is the governing authority; when its meetings lack excitement, this dullness eventually pervades the rest of the organization,” (Stanford Social Innovation). How can the passion that brought board members to the organization be reinforced if they are not directly (or even indirectly) experiencing the impact of the organization’s activities? This issue is particularly salient for arts organizations, where it is difficult, if not impossible, to demonstrate on paper the true impact of the organization’s activities. As a

“The complexity of what happens in an effective board is great, and the stakes are too high to risk missing a key step or detail.”

Steph Dlugon, NTEN

result, board members can find it difficult to understand how their duties translate to impact from a holistic perspective.

Technology can be utilized to deepen or encourage engagement. Steph Dlugon argues for the [integration](#) of technology in all board activities, explaining “The complexity of what happens in an effective board is great, and the stakes are too high to risk missing a key step or detail,” (NTEN). Software specifically designed for board management is a growing market with the potential to address board engagement through unique and pervasive methods. In addition, many applications can be utilized to leverage the capacity of the board, making it easier for board members to connect with their organization.

Understanding the unique issues facing a board is the key to determining the best solutions. Once those issues are identified, the path to the most effective technology solutions will be much clearer. The following discussion presents common problems among boards of nonprofit arts organizations and offers potential technology solutions to help resolve them.

ISSUES

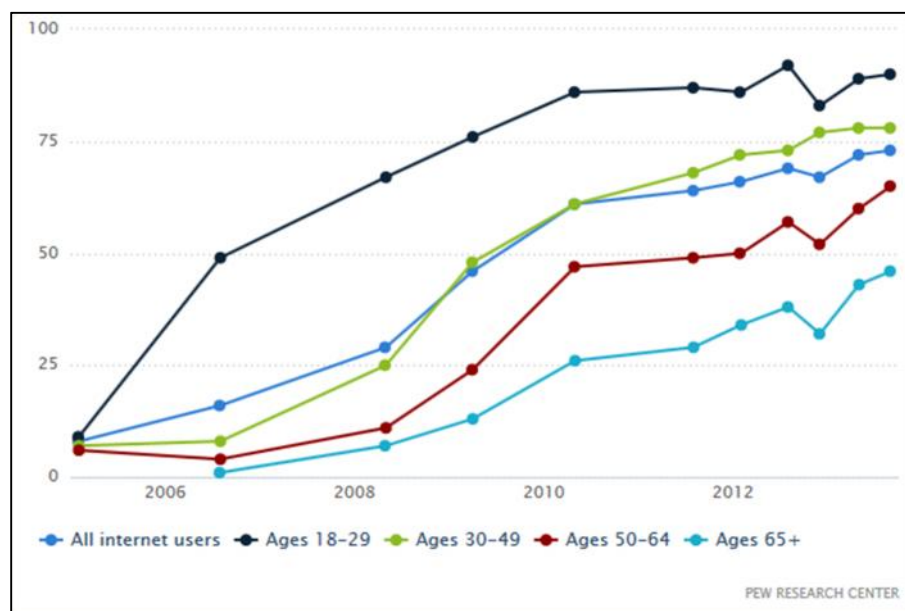
DIVERSE PERSPECTIVES AND CONFLICTING COMMUNICATION STYLES

A major issue that many board members face is lack of communication with each other.

Furthermore, differences in board member age, background, and culture may yield differing communication preferences, potentially creating tension between members. Michael Davidson [states](#) that younger board members may perceive reluctance from older board members to change working styles as a lack of initiative, leading to frustration “when their fellow board members resist using more efficient ways of working just because they are ‘not the way it is done,’” (Ventureneur). It may seem difficult to integrate technology as a solution to this issue, especially since the majority of members of many art organization boards are older.

Different generations have different values and expectations due to events and norms that have

shaped their lives (Forbes). It is important to understand these differences when considering how to best incorporate technology into board activities. It is possible that the majority of the board is composed of the Silent Generation (1925-1942) and the Boomer Generation (1943-1960), though a growing number of members are likely to belong to Generation X (1961-1981) and even Generation Y, aka “Millennials” (1982-2004). Gaining support for new communication strategies from Silents and Boomers may take some effort, but it is not impossible. The [Pew Research Internet Project](#) states that 88% of adults age 50-64 and 57% of adults age 65+ use the Internet. In addition, 65% of adults age 50-64 and 46% of adults age 65+ use social networking sites (Pew). These figures suggest that older generations understand the potential that online technology holds for communication as much as younger generations do. By leveraging this understanding, online technology can be utilized as an effective communication solution.



Social Media Use by Age Group Over Time. Source: [Pew Research Center](#)

LACK OF CONNECTION TO THE WORK OF THE ORGANIZATION

A large issue that is particularly salient to arts organizations is a lack of connection between board members and the core programming and activities of the organization. Fostering a connection to the art produced or presented by the organization is integral to an increased understanding of how the efforts of the board assists the organization in making its work more impactful. Often, materials for the board are prepared with an assumption that board members know what activities and programs the organization is doing. According to Tom Healy, the chairman of the Board of Creative Time, that [isn't always the case](#). He writes, "Board leaders and executive directors should never assume trustees are familiar with the organization's day-to-day projects," (Chronicle of Philanthropy). If the board doesn't know about the work of the organization, it can be difficult for board members to connect their duties to something meaningful. After all, one does not necessarily

Often, materials for the board are prepared with an assumption that board members know what activities and programs the organization is doing.

That is not always the case.

assume a connection exists between asking a coworker for a donation and new paintbrushes for early childhood art classes. Bringing these types of connections to light is the key to engaging and motivating board members. Angela Newman, the Board Chair of Nashville RBI, [suggests](#) that linking board efforts to impact can help to establish a sense of commitment and motivation among board members. "Always share the successes of their efforts and show appreciation for the time and talent they contribute," states Newman (Nonprofit Conversation). By understanding the larger picture, board members are more likely to be motivated to complete their duties and tasks out of a sense of dedication to the organization. By realizing how going to a meeting can translate to a decision that moves a critical project forward, for example, board members will be inspired to attend that meeting and participate.

LACK OF ATTENDANCE AT BOARD MEETINGS

Lack of attendance among board members is an ongoing issue for many organizations, arts and otherwise. Lack of attendance at board meetings makes it difficult to accomplish tasks or make decisions, particularly without a quorum; thus, low attendance can lead to organizational stagnation. The demanding lifestyles of many board members can push board meetings farther down on a compelling list of priorities. It is also possible they may not realize the importance of their attendance; perhaps they are not familiar with the organization's bylaws, or maybe this is their first time serving on a board of directors. Gene

Takagi [argues](#), “Failure to regularly attend board meetings likely signals a director’s inability or unwillingness to meet the director’s fiduciary duties to the organization and its mission,” (Nonprofit Conversation). Misconception or low-prioritization is often compounded by the difficulty of accessing a current calendar of events when scheduling other commitments for work or family. For example, it might be difficult to access the board portal or beginning-of-the-fiscal-year email from an iPhone when scheduling a parent-teacher conference from a high school hallway. Working to make meeting information more available may alleviate attendance issues by allowing the information to be readily available as the board member is making scheduling decisions.

NO RECORD (OR ILL-KEPT RECORDS) OF BOARD PERFORMANCE

Many arts organizations want to improve board performance, but it is impossible to know areas of strength and weakness if there is no understanding of each board member’s background and experience with the organization. Alice Korngold, president of Korngold Consulting, [states](#) that the question is no longer “Do we have the right board members?” but rather “Do we have the board members with the expertise, diversity, relationships, etc. who can help this organization to achieve its ‘Greater Vision’ in the next few years?” (Huffington Post). According to a survey conducted by Streamlink Software, 54.5% of board members never assess whether their organization is achieving its mission. It is critical to know the board’s perspective on mission fulfillment before deciding on the best

course of action for improvement. In addition, it is also important to keep a record of how the relationship between individual board members and the organization changes over time. By spending time on the micro-level interactions specific to each board member, the organization can nurture these relationships, leading to more mutual understanding and respect. “Boards become energized and enthusiastic when they begin to envision how their organizations can have an even greater impact and understand how they can help to make that possible,” explains Korngold (Huffington Post).

SOLUTIONS

CLOUD-BASED DOCUMENT MANAGEMENT

Issues Addressed:

- ✓ Diverse perspectives and conflicting communication styles
- ✓ Lack of connection to the work of the organization
- ✓ Lack of attendance at board meetings

One of the issues at the root of many problems that boards face is the lack of a centralized document library. Only 46.8% of board members [believe](#) that board resources are accessible, logically organized, and easy to use (Streamlink Software). Often, documents are sent at the beginning of the meeting, edited during the meeting, and an updated version is sent afterward. Sometimes the document is passed between several members to be edited. This practice can create problems, because changes are not automatically saved to the older version and people may be unsure of which version is the most recent. Rather, documents essentially become static each time

a version is saved and distributed. In some cases, documents are only distributed in paper form, or the electronic form is difficult to track down. Chris Bernard [states](#), “From bylaws and governance documents to financial statements, donor and fundraising information, meeting minutes and more, the amount of paperwork used in even a single board meeting is staggering...no one wants to carry around heavy binders with documents they only need on occasion,” (Idealware). As a result, Board members may reference incorrect or out-of-date documents, or may lose interest in studying the document at all because they can’t or won’t search through the piles of paper or their email inboxes to track down the different versions of the document that has been passed around.

Cloud-based document management [presents](#) an efficient and cost-effective solution. The cloud [offers](#) the same benefits of an on-site management system, like a document library and a record of changes and comments, while also allowing the most recent version to be instantly accessible from any device at any point in time (Soft Choice Cloud). By storing a document in the cloud, it becomes “live.” Changes are automatically saved, so the next editor is always accessing the most recent document. This makes it easier for board members with varying schedules to efficiently collaborate on projects. For example, if two board members from the Events Committee can’t meet in person to help plan a reception for a new exhibition, they can remotely make changes to a document in the cloud and the system will automatically save each version.




Documents are available anytime and anywhere; if your Board member is meeting with a potential donor, they can access up-to-date documents detailing performances and programs from their smartphone, laptop, or workstation.

Cloud-based document sharing for board members are mainly provided through board portals, an increasingly popular platform solution. Board portals are secure networks for board members to post and collaborate on documents, access meeting information, and discuss ideas. [BoardMax](#) is one example, developed by StreamLink Software. Board Max features a central document repository that includes built-in securities, so that only permitted members access the documents they are supposed to view. In addition, BoardMax can create comprehensive meeting packets by pulling documents from different programs. The portal also features a centralized organizational calendar to keep track of meetings, performances, shows, and events. Board members can login and access meeting minutes, updated regulations, and financial documents, even if they miss the meeting itself. Board portals are also useful for improving the understanding of board duties, for example by ensuring that attendance policies are available through a centralized document library. By making a master copy available, board members will be able to access them whenever necessary.

Another cloud-based solution to consider is [Basecamp](#), a general cloud-based document

sharing app that assists in project and document management. Basecamp is easy to install and use because the app requires no IT support from the organization; it runs in the cloud on Basecamp's secure servers. Basecamp features the safety of a secure server, but has a casual, open feel that is more similar to a social networking site. Documents, photos, and videos can be shared with board members. Changes can be made and updated in real-time, and comments can be recorded. To-do lists can be created and meetings and events can be updated in a live calendar. In addition, members can send out documents for

review and seamlessly collect feedback. Once the organization establishes an account with Basecamp, members can register by downloading the app to their device of choice, allowing them to access the portal anywhere. [EScribe](#) has similar features to Basecamp, offering a cloud and server-based portal that features a robust profile for every event in the calendar. The profile includes agenda, attendees, and any pertinent documents. EScribe also offers an iPad app that allows members to overlay private comments on the documents that they can easily access during the meeting.

Product Comparison Cloud-Based Document Management		
		
<ul style="list-style-type: none"> ▪ Budget-based annual fee (\$500-\$5500) ▪ Centralized document repository ▪ Assembles materials into packets ▪ Central organizational calendar ▪ Built-in voting module ▪ Time and financial contribution tracking of members ▪ Potential member database ("bullpen") 	<ul style="list-style-type: none"> ▪ Budget-based monthly fee based on projects (\$20-\$150) ▪ \$3000 annual fee ▪ Big -picture interface to contextualize documents ▪ Automatic executive summary emails of daily activity ▪ Calendar and task functions ▪ Work and brainstorming feedback function 	<ul style="list-style-type: none"> ▪ Tiered pricing structure, beginning at \$3750 ▪ 2-tier task and action log summary ▪ Expandable storage ▪ Supports flexible meeting hierarchies ▪ Social media integration ▪ User-configurable meeting and attendee profiles

PRIVATE SOCIAL NETWORKING APPS

Issues Addressed:

- ✓ Diverse perspectives and conflicting communication styles
- ✓ Lack of connection to the work of the organization



Social networking models face-to-face social interaction patterns increasingly well, making it an ideal solution to increase accessibility to engagement and connection opportunities between arts organizations and its board. Social networking sites such as [Facebook](#) or [Google+](#) may not be secure enough to hold confidential conversations, but private social networking apps are emerging as a solution for both nonprofit organizations and small businesses. These apps feature increased privacy on a platform that allows board members to converse securely about performances, events, and interactions of the organization, or about artistic theories on a grander level. While conversation features are available on many board portals, a social network may be a more comfortable setting in which board members can hold conversations.

For example, say the board was helping to brainstorm new sources of funding at the last meeting. One member decides to do more research, and discovers an infographic of sources of arts funding and an accompanying article about funding issues facing arts organizations. She then posts the article with her thoughts, which sparks a conversation about arts funding at large. By conversing about these theoretical issues, the board will be able

to better contextualize how its organization fits into the bigger picture of arts funding.

Consider creating a group for board members on [EveryMe](#), a free, easy-to-use private social networking app. EveryMe allows users to post images, videos, and stories to share with their groups. Board members can connect online by privately sharing inspirational thoughts, ideas, and stories from their interactions with the organization or elsewhere. For example, if a board member attends the organization's performance and has an impactful conversation with a young audience member, she can share her story on EveryMe and another board member can become inspired on his iPad halfway across the world.

Another application to consider is [Glassboard](#), which has the same features as EveryMe. In addition, Glassboard Premium is an affordable option that allows owners to export group content history, including messages, comments, likes, pictures, and videos. This data could be analyzed and summarized regularly and presented at board meetings, so that major ideas and trending topics are emphasized. Glassboard has a newsfeed style similar to many major social networks, creating a smoother transition for members already connected to a site like Facebook. Over time the newsfeed will collect the stories, thoughts, ideas, and celebrations of the board, creating a record of teamwork and collaboration. Board members can return and scroll through the history with ease, whether in the airport, at a coffee shop, or in the office.

Product Comparison Private Social Networking Apps	
	
<ul style="list-style-type: none"> ▪ Free ▪ Groups feature ▪ Message, picture, and video-sharing ▪ User-owned data and strong privacy policy ▪ Cross-device compatible ▪ Accessible via email and web 	<ul style="list-style-type: none"> ▪ Free ▪ Premium option available for \$24.99/year ▪ "Boards" group feature ▪ Message, picture, video, and file-sharing ▪ Location sharing ▪ Board export (premium feature)

INTEGRATED CALENDARS

Issues Addressed:



- ✓ Lack of attendance at board meetings
- ✓ Lack of connection to the work of the organization

Online technology can assist in clarifying tasks and focusing board members on their completion. Interactive agendas and calendars can help board members make meetings a priority. Often meeting details change; interactive calendars provide a solution by ensuring that a master calendar with up-to-date details is easily viewable. Board members will know when meetings are happening and what is being covered.

It is equally important that calendars are consistent across different channels. For example, the calendar on the board portal must sync with Gcal, the Outlook calendar, and any other calendar the arts organization and its board members use. Apps such as [SyncMyCal](#) automatically sync changes between Gcal and

Outlook. Organizations can set up a Google Calendar that details meeting dates and general items for discussion, and each board member can sync it with her Outlook work calendar. As a result, if a committee meeting moves up an hour on the Gcal, board members will automatically receive an update on their Outlook calendars when the change occurs.

Another way to encourage accessibility of the Board meeting schedule is to encourage board members that use smartphones to download a calendar integration app. One example is [Everythink](#), an app that features a “drag-hover-drop” motion to move any data object into the planner and to move planner items between calendars. In addition, multiple calendars can be viewed together or separately so that if the board calendar is synced with the app, the meetings will appear whenever the member accesses his or her app. This availability and integration of information allows board members to easily integrate board meetings and events into their everyday planning processes.

Product Comparison Integrated Calendars	
	
<ul style="list-style-type: none"> ▪ Cost depends on number of users ▪ Automatic sync between Gmail and Outlook ▪ Publish status and complete event information ▪ Configurable preference settings 	<ul style="list-style-type: none"> ▪ One-time cost of \$6.99 ▪ "Drag-hover-drop" moves tasks to calendars ▪ Access any uploaded files from within app ▪ Sync with multiple external calendars

ONLINE ASSESSMENT

Issues Addressed:

- ✓ No records or ill-kept records of board performance
- ✓ Lack of connection to the work of the organization



Board assessment is an emerging trend among nonprofit organizations. Similar to evaluating the organization’s programs and employees, assessing board members helps to identify successes, issues, and overall trends among the board. This type of assessment is best approached from a more relaxed perspective than an employee performance evaluation; though the board does have responsibilities, members voluntarily commit their time and being overly critical could be detrimental to moving the body forward. It is best instead to view an assessment as an opportunity for board members to reflect on their experiences and share ideas and suggestions for improvement of the board as a whole. It allows the organization to understand how Board members are feeling and to improve where possible.

While an assessment may be an optimal solution, it can be difficult to implement one in-person, especially if attendance and performance issues already exist. Assessing the board online may be a better solution because it allows members to reflect and write on their own time and can offer transparency between the Board member and the organization’s leadership. Several online assessment tools, some of which are designed specifically to assess boards, are currently available. For example, the New Hampshire Center for Nonprofits has an affordable [online tool](#) that features an online survey and automatic tabulation. The assessment reviews different aspects of governance, including External Relations, and the relationship between the Board and the Staff of the organization (New Hampshire Nonprofits).

It is also possible to gauge general reactions and responses to the organization, meetings, and unique experiences by designing a survey on a free survey site. Many sites, such as [Survey Monkey](#), provide automatic tabulation and the ability to export data. Survey Monkey

also features a host of question styles and response options. The survey can be posted to the board portal, shared on private networking sites, and emailed to the listserv. Once the results are tabulated and analyzed, they can be utilized to understand what path will be best to

improve board engagement, motivation, and performance. The results can be compiled and shared out during the next board meeting, potentially sparking a more candid discussion about how the board can best work to solve the issues facing the organization.

Product Comparison Online Assessment	
 <p>The Board Self-Assessment</p>	
<ul style="list-style-type: none"> ▪ Cost: \$50 (free in New Hampshire) ▪ Facilitated participation ▪ Pre-determined question set ▪ Advanced assessment by NH Nonprofits 	<ul style="list-style-type: none"> ▪ Free (up to 10 questions) ▪ Question design and templates ▪ Response collection and analytics ▪ Export Function

CONCLUSION: FINDING YOUR PATH

It is important that arts organizations look to the people, current issues, and external factors that impact each of its board members. Once context, constraints, and problems are ascertained, the organization can move forward with solutions to improve board performance.

Various technologies can be utilized to address several common issues facing arts organizations and their boards. Software, both board-specific and general management, as well as online and mobile device apps that feature secure servers and enhance privacy have the potential to change the way that board members communicate, collaborate, and lead organizations.

Transitioning to more technology-friendly board management will not only be good for the organization's present, but also for its future. Boards are continually gaining members that are not only technologically proficient, but who have inextricably woven technology into their everyday lives. These technologies have the adaptability to enhance connections and interactions. By working to introduce and develop technological practices that enhance, not replace, human interaction, arts organizations can increase the efficiency and effectiveness of their boards. By integrating these practices in a way that improves how members currently interact, they will in time become a natural extension of how the board communicates.

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