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How to Keep Trustees Energized in the Bad Economy: Tips From Experts

By Holly Hall

With charities struggling through years of budget cuts and diminished contributions, board members are under more strain than ever to bolster the nonprofits they serve. To reduce the risk that trustees will burn out or perform poorly under the added pressure, charities can do a variety of things, including setting term limits and holding orientations for new trustees.

Here are some other ideas to keep board members engaged and productive:

Adopt tryout board terms. The Child Abuse Prevention Association, in Independence, Mo., offers a one-year initial term for all new board members. That is followed by a regular trustee term of three years—but only if both the trustee and the organization agree they want the relationship to continue. To date, only two people on the group’s 21-member board have left after serving some or all of the initial one-year term.

“Board members who are not able or willing to engage will quit coming to meetings, and the president can say, “Thanks for your interest,”” says Jeanetta Issa, the charity’s chief executive. “This seems to work well for us.” Ms. Issa says she’s introduced the same tryout terms in at least three other nonprofit organizations where she has been on the board, all with good results.

Create board-succession paths. Trustees in key positions feel less stress when they know that qualified board members are ready to take over if they become fatigued or their term ends, says Ms. Issa. That’s why she suggests appointing a vice president of the board to assist the president, as well as three other vice chairs who each oversee a key area such as fund raising or programs. That way, any of these key trustees is capable of stepping into the leader’s role, she says.

The Louis August Jonas Foundation, in New York, recently took steps to ensure that its current board president has access to colleagues who can fill his or her shoes if needed. The charity created a

formal position for its immediate past president and another for a president-elect; both work closely with the board president.

Formalize leadership changes. For the past three years, Susan Meier, a consultant at BoardSource, a Washington group that aids charity boards nationwide, has facilitated a half-day annual meeting for the board chair, incoming chair-elect, and executive director of the American Society of Mechanical Engineers. The meeting, which takes place six months before the chair-elect takes over every year, has built trust among the three leaders and helped avoid frustrations by providing a place for them to share hopes and fears for the organization and its board, Ms. Meier says. Even though some of the same people have been involved each time, she says, “it’s different every year.”

With the incoming chair-elect, “you can see the learning take place,” says Thomas G. Loughlin, the association’s executive director. “By the time the person becomes president, they have learned so much. We have had quite a positive impact on the effectiveness of these folks as leaders.”

Other charities organize a formal meeting for the same purpose between trustees and a new chief executive, ideally within the new leader’s first three months on the job. New executive directors are oftentimes “so busy that they overlook or do not pay enough attention to the board,” Ms. Meier says. (According to “Daring to Lead,” a survey of more than 3,000 executive directors that was updated this year, there is a strong correlation between the time an executive director spends working with the board and his or her satisfaction with board performance.)

Show appreciation. Carol Weisman, a St. Louis board consultant, says that she frequently gets calls from charities that complain about their boards but do little to show individual trustees that they appreciate their efforts.

“You cannot use a stick” to get board members to do more, she says, but these groups “are not using a carrot, either.”

Ms. Weisman recommends appointing a staff member or trustee to come up with fun ways to show appreciation to individual board members. For example, the organization can provide special parking for board members who take on extra duties, give a “member of the moment” award to trustees who work hard behind the scenes, or surprise productive trustees by arranging for their cars to be washed and detailed during a board meeting.

Other simple ideas include acknowledging time trustee have spent away from family members in a thank-you note to board members' spouses after a big project and sending press releases about new trustees to local newspapers, business journals, and the trustees' own companies.

Spark action. Gail Perry, a Raleigh, N.C., consultant who advises charity boards, says that she sees “more exhaustion than usual” because board members see the struggles charities face to get resources. To help boards grapple with problems in a more productive way, she sometimes asks trustees to break up into small groups and list their organization's biggest challenges. Then she asks them to brainstorm about how to turn each one into an opportunity.

“That totally frames the discussion differently,” she says.