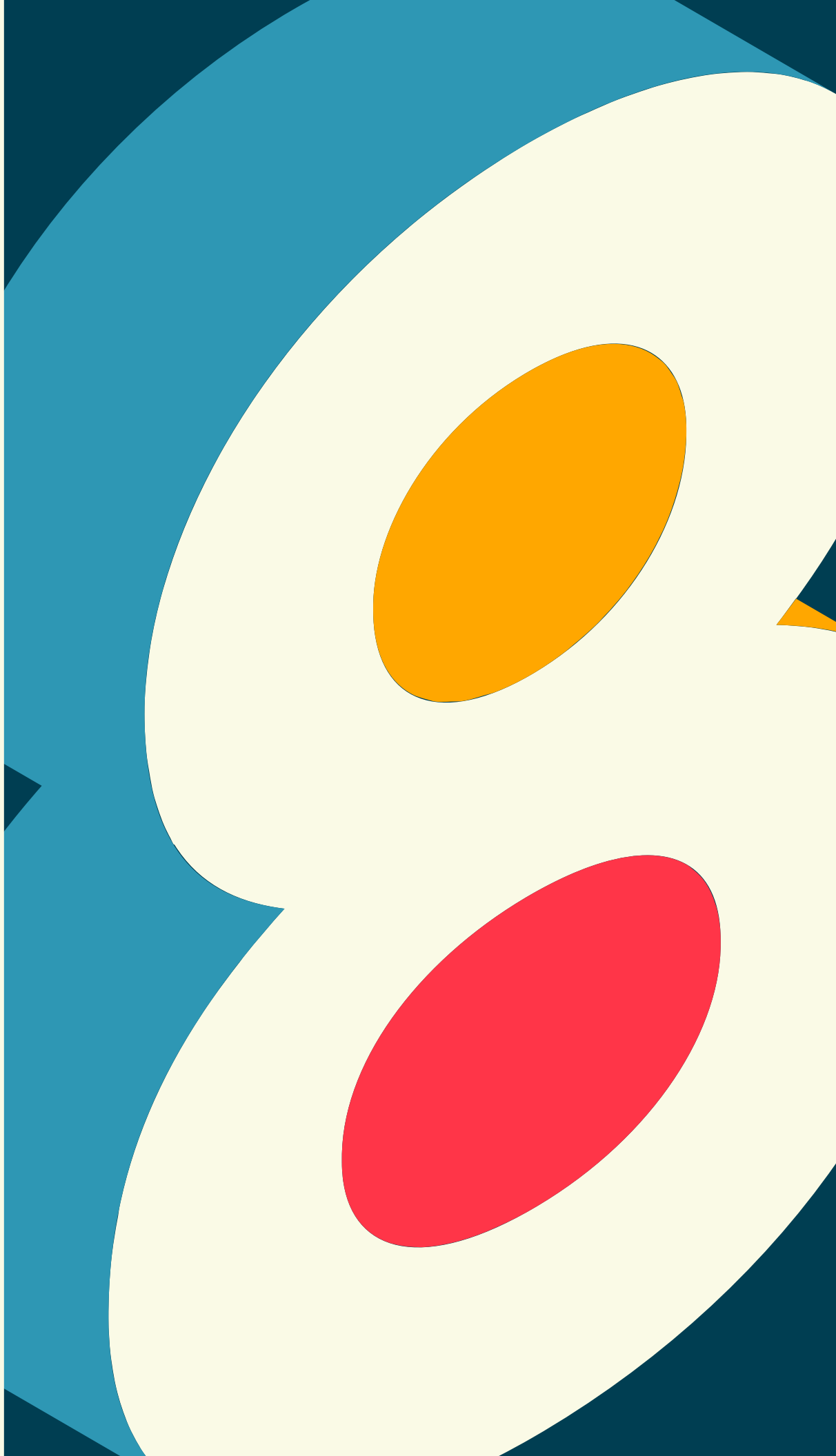


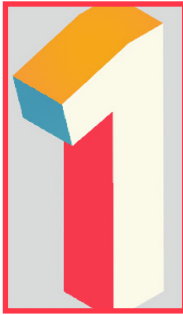
Eight Ways to Increase Your Board's Ability to WORK AS A TEAM





Teamwork — so goes the saying — makes the dream work. Board work is, fundamentally, a collective effort, and it requires a unique kind of teamwork among members. But getting a board to function as a highly effective team is not easy. Type A personalities abound and can make it difficult for Type B to make a meaningful contribution. In this resource, BoardSource presents eight-plus tactics you can utilize to increase your board's ability to collaborate and work as a team. Effective teamwork depends not only on who is on the board and how it is led. Board structure and practices also shape how the board functions as a collective body. The tactics presented here are not an exhaustive list. Board dynamics and board member relationships require constant care and feeding, and there are many ways to do that. This list is just a start.

But before you dig in, please note that effective teamwork does not mean avoiding conflict. It actually means encouraging a bit of conflict! It means drawing out all viewpoints and ideas, being committed to informed debate and analysis, active listening, giving constructive feedback, being open to changing one's mind, and standing behind any decisions made. In fact, if your board team is not voicing any differences in opinion, it may be getting along too peacefully and not thinking critically as a team. The key is to disagree without being disagreeable.



BE ATTENTIVE TO PEOPLE SKILLS WHEN BUILDING YOUR BOARD

Once a year, the governance committee should seek the board's guidance to assess future organizational needs, current board competencies, and diversity criteria for the next class of board members. In addition to looking for professional skills and demographic criteria that will ensure diversity in your board's composition, ask your committee to also look closely at personal traits that will advance the work of the board, such as the ability to work effectively within the group process of a collective decision-making body.

In a 2010-2011 survey of U.S. Senior Executive Service (SES) members,* the respondents identified successful collaborators as having the following attributes and skills:

Individual attributes:

- Open mind
- Patience
- Self-confident and risk-oriented
- Flexible
- Unselfish
- Persistent and diligent
- Diplomatic
- Honest
- Empathetic
- Trustworthy
- Respectful
- Goal-oriented
- Self-aware
- Decisive
- Friendly
- Sense of humor

Interpersonal skills:

- Good communicator
- Excellent listener
- Works well with people

Group process skills:

- Facilitation
- Negotiation
- Collaborative problem solving
- Skill in group dynamics, culture, personalities
- Compromise
- Conflict resolution
- Consensus building
- Mediation

How can you tell if a potential board member has any of these attributes and skills? Have a courtship before marriage. Invite a potential member to serve on a task force or ad hoc advisory group. Get to know candidates by inviting them to lunch or organizational events. And do your due diligence: Talk to people who work with a potential candidate professionally or through community service.

When it comes time to vote on a slate of candidates, discuss each one individually, not forgetting to focus on his or her ability to work with others. If anyone thinks, knows, or has learned that a candidate is overbearing, it may make sense to reconsider his or her candidacy at this time.

Food for thought: Trial periods for incoming board members. For example, Arena Stage in Washington, D.C., initially brings on new board members for a one-year term, giving the board the opportunity to determine if the fit is good and if the member has the desired skills. Near the end of the first year, the board chair and member meet to talk about how things are going. If they mutually agree that things are going well, then the member is nominated for a three-year term; if not, they part ways.

*"The Skill Set of the Successful Collaborator" by Rosemary O'Leary, Syracuse University; Yujin Choi, Florida International University; and Catherine M. Gerard, Syracuse University. Published in *Public Administration Review*, The American Society for Public Administration, 2012.



MODEL COLLABORATION THROUGH MENTORING

Mentoring new board members is a great way for a board to model collaboration and show that teamwork is a part of the board's culture. It facilitates trusting and more meaningful board member relationships, building board cohesion, and ultimately contributing to the level of shared understanding that promotes more informed decision making.

A national educational agency has implemented a board mentoring orientation program that works in the following ways:

- Every new board member is assigned a veteran board member mentor from day one to hasten his or her integration and involvement. The governance committee does this matching.
- Mentoring partners meet virtually and/or in person prior to and after board meeting during the first year of board service.
- The board mentors welcome the new board members to the team by introducing them to the people, issues, and work of the organization and serving as go-to people and sounding boards.
- As mentors get to know the new board member, they confer about how to best utilize the mentee's time and talent and enhance his or her board experience.

To build, grow, and support a viable board mentoring program and culture, Lois J. Zachary, president of Leadership Development Services, LLC, in Phoenix, Arizona, suggests the following:

- Establish concrete learning objectives and long-term goals that you can measure and celebrate.
- Secure visible support, involvement, and commitment from the highest levels of the board and staff. Involve the governance committee in developing, implementing, and evaluating the program.
- Determine how to pair mentors and mentees. This will depend on your goals and learning objectives.



HELP YOUR BOARD MEMBERS GET TO KNOW EACH OTHER

Creating a collaborative boardroom culture can be difficult when board members don't know each other very well. As Nancy Axelrod notes in [Culture of Inquiry](#), having fun together is not a waste of time. Informal interaction with board colleagues builds social capital, promotes teamwork, and creates greater loyalty and desire on the part of board members to collaborate and contribute as a group. When a board member wants to raise a different opinion, he or she is more likely to speak up among people who are not just passing acquaintances.

To overcome the potential barriers of distance, diversity, demographics, and varying years of service, there are a number of ways to help board members get to know each other on a personal level and foster trust and mutual respect in their exchanges.

Host a lunch or dinner before or after a board meeting every quarter or twice a year. Invite members of the management team and board members. The organization pays for the cost of the meal, so everyone can attend regardless of expense limitations.

Invite board members to share something that their colleagues are not likely to know about them. This helps board members learn about professional interests and accomplishments, personal passions from hobbies to philanthropic interests, community involvement, or significant family events.

EIGHT WAYS TO INCREASE YOUR BOARD'S ABILITY TO WORK AS A TEAM

The board of a community service organization begins each board meeting with a quick roundtable session during which board members share what's new in their lives — some meaningful event. A school board opens its meetings with a different question every other meeting, such as “What's the best movie you're seen recently?” or “Best book you've read?”

Share biographical sketches. To help its board members get to know each other, Thornwell Home for Children produces a board member profile document that includes a biographical sketch of each member with background information about his or her expertise and interests. The document has had a positive impact on the Thornwell board. When it discusses investments or insurance or planning, for example, the members know who around the table has expertise in that area. And the members learn some personal things about each other that help them bond.

Schedule board retreats. In addition to allowing board members to step back from its typical business routine and focus on a big issue, retreats give board members more time to get to know each other, explore common interests, and appreciate other facets of their colleagues' personalities and perspectives.



An effective board functions as a high-performing team. In the *Wisdom of the Team*, Jon R. Katzenbach and Douglas K. Smith defined such a team as “a group of people with complementary skills who are equally committed to a common purpose, performance goals, and approach for which they hold themselves mutually accountable.”

One way to get board members to collaborate and work as a team is to develop a mission statement for the board itself. Here's an example from a community service organization:

“The board's mission is to ensure the long-term ability of this organization to provide best-in-class services by focusing on long-term funding sources and by enhancing public recognition. This requires us to position the organization strategically to best respond to the critical needs of children and families.”

Working together on a statement to determine their common purpose is an empowering, enlightening, and team-building process for board members.

Begin by asking the board, “What is it that this board provides to the organization that no other board can?” After everyone has answered, break into small groups to discuss the responses and produce one statement that is reflective of each group. Display the responses, and have the full board look for commonalities and agree on one final version.

Not only does this activity end with a common purpose for the board, but it also builds and solidifies relationships among individual members.



DETERMINE YOUR BOARD'S ANNUAL GOALS AND CREATE A WORK PLAN

The highest-performing teams focus on worthy goals. The Pareto Principle, also known as the 80-20 rule, applies here. Boards should spend 80 percent of their time on the 20 percent of the topics that have the most bearing on the organization's success. But how do boards determine what those topics are?

One way is to ask the board, "What is the most important question we will have to address in the next 12 to 18 months?" If numerous topics emerge, have the members vote. Distribute green, yellow, and red sticky dots to everyone. A green dot

denotes a member's top choice, yellow dots denote their second choices, and a red dot — a veto vote — rules out a topic. Once everyone has voted, it's easy to see what the team deems important. You then might plan an annual work plan and agenda that reflects the board's priority or structures the board into task forces to address the key issues and make recommendations.

Participating in strategic planning or initiating a capital campaign are other ways of getting the board involved in setting a compelling direction for itself and the organization.



ADDRESS CHRONIC NON-COLLABORATIVE BEHAVIOR

Has your board lost its collaborative nature due to a member who regularly dominates discussions, doesn't listen, bullies, displays a controlling personality, or even sits silently, not contributing at all to the team?

To handle these types of situations, Katha Kissman, a BoardSource senior governance consultant and author of [Taming the Troublesome Board Member](#), suggests you discuss the matter directly and privately with any individual displaying chronic behavior of this sort.

This task should fall to the board chair, who is the facilitator of the governance process, in the presence, perhaps, of the governance committee chair or another board member, such as the vice chair.

Giving and receiving feedback is most successful if you follow some simple ground rules:

- State your intention as to why you wish to give feedback.
- Be descriptive rather than evaluative. Provide specific examples of the behavior.
- Direct the conversation at elements the board member can do something about. Suggest specific ways he can demonstrate changed behavior, such as intentionally working on improving his or her listening skills.
- End the conversation with a summation that ensures that you have made your point clearly and that the board member understands how his or her behavior affects the group and the collaborative process.
- Ask if the person has any questions or responses and then listen.

If you made several efforts to effect a change and it has become clear that the board member's behavior is compromising the board's ability to work as a team and provide effective governance, the board should consider removing the member. This can happen if the board has a removal clause in its bylaws. If there is no removal clause, you should consider adding one. There are other ways for this to happen as well, including a personal invitation to leave the board.



WORK WITH OR REVISE YOUR BOARD SIZE, STRUCTURE, AND PROCESSES

Your board's size, structure, and processes can have positive — and negative — effects on collaboration.

Break into small groups to discuss issues

Larger boards may not be able to provide all members with an equal opportunity to engage in a meaningful, collaborative activity, which can result in apathy and loss of interest. Members of large boards also have a tendency to form cliques and core groups, thus deteriorating overall cohesion. Smaller boards allow for easier communication and interaction. Board members get to

know each other as individuals, and every person's participation counts.

If your board is large, consider using small groups during the deliberation process to directly involve every member. Small groups can more efficiently discuss various aspects of the same issue. The board can divide bigger issues into smaller increments and task the smaller groups with discussing the smaller aspects of the issue and then reporting back to the board with its ideas. Small groups provide more opportunities for collaboration and teamwork.

Larger boards may want to consider downsizing if your members have lost their common connection due to sheer volume of peers whom they do not know, have no other duties but to come to meetings, and/or are not attending meetings due to not feeling their contributions are needed.

Provide all members with an opportunity to be involved in committee work

Committees provide board members with a way to collaborate and use their expertise that regular meetings do not. Committee assignments should be distributed evenly across the board so that every member has a chance to be involved in committee work.

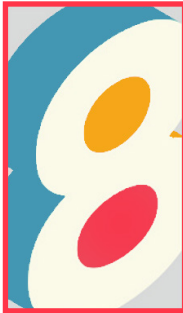
But, beware the executive committee

Executive committees can foster and exacerbate an inner and outer class structure within the board. And, as nonprofit governance experts Richard Chait, Thomas P. Holland, and Barbara E. Taylor have said, "Any device that creates an 'inner board' and an 'outer board' virtually ensures that the board, in toto, will not operate as an effective team."

If your board confers authority to an executive committee, limit its powers and require that any decisions be subject to later ratification of the full board. Some boards have guidelines that say that any work done by the executive committee should always be brought to the full board in the form of at least two alternatives. This gives all board members the opportunity to participate and influence decisions.

Have regularly scheduled executive sessions

Executive sessions provide a venue for handling issues that are best discussed in private, for fostering robust discourse, and for strengthening trust and communication. Distinguished by their purpose and participants, executive sessions serve three core functions: (1) they assure confidentiality, (2) they create a mechanism for board independence and oversight, and (3) they enhance relationships among board members and with the chief executive.



ASSESS HOW WELL YOU ARE WORKING TOGETHER

BoardSource considers performance assessment key to increasing board effectiveness. Assessing a board's performance in the area of collaboration and teamwork can be done in several ways.

Meeting Evaluation

The day after a board meeting, the board chair or governance committee chair should send a short meeting evaluation form to each member that includes questions related to teamwork, participation, and collaboration. Sample questions:

- Do you think the meeting focused on the right strategic issues?
- Did the meeting agenda allow adequate time for discussion?
- Did you feel free to express your ideas and share your opinions?
- Did all board members actively participate in the meeting and discussions?
- Were you comfortable with how all board members interacted with each other and the staff?
- How do you think the board can improve its teamwork?

Board Dashboard

In addition to using a dashboard to track their organization's performance in key areas, some boards use a dashboard to chart how the board itself is performing over time in such key areas as meeting attendance, meeting effectiveness (based on meeting evaluations), fundraising goals, committee participation, and advocacy. All point to a board's ability to work as a team in meeting its responsibilities.

Board Self-Assessment

BoardSource recommends that boards assess their overall performance every two years and build tangible board development plans based on what they learn. Ensure that any survey your board members complete includes questions related to its ability to work as an effective decision-making team.

Peer-to-Peer Assessment

Peer-to-peer assessment goes a step further by asking board members to evaluate their individual performance and that of their peers to learn how the culture of the board is affected by the style and engagement of its individual members.

Additional resources:

[*Taming the Troublesome Board Member*](#) by Katha Kissman

[*Culture of Inquiry: Healthy Debate in the Boardroom*](#) by Nancy R. Axelrod

[*Executive Committee*](#) by Mark Light

[*Transforming Board Structure: Strategies for Committees and Task Forces*](#) by Marla J. Bobowick, Sandra R. Hughes, and Berit M. Lakey

[*Boardroom Chemistry: Getting Your Board to Govern as a Team — A BoardSource Toolkit*](#)