Bridging the Gap: Communication Best Practices for Management and Board Members

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One of the great things about serving the nonprofit industry is working alongside board members and management teams that are equally passionate about their organizations' missions. However, one of the biggest challenges organizations face is achieving goals in a timely fashion when so many parties are involved.

Since the onset of the pandemic, nonprofits have needed to brainstorm how to navigate organizational challenges that previously never existed at this level and/or intensity before, encompassing cash management, liquidity, reforecasting, availability of accurate data, availability of timely information, employee morale and more. As a result and as nonprofits plan for the future, communication between board members and management is especially critical.

Below are considerations that can help facilitate synergies and optimize communication between board members and management.

1. Communicate effectively and efficiently to avoid data overload. To keep communications concise and consistent, management should provide board members with focused information more frequently and stick to a clear and focused agenda. It can be helpful for management to anticipate questions that may arise around the organization's needs and challenges, and proactively share potential solutions in meeting preparation materials for board members. This pre-meeting preparation enables teamwork between the two groups and provides board members with the opportunity to brainstorm ahead of the conversation with management.

2. Engage with board members individually. It's also important to engage with board members individually outside of group meetings. Management should have separate and periodic meetings with key players, like the board chair and subject matter experts who are on the board. This can be particularly helpful during a time of crisis, when time is of the essence and it may not be appropriate to wait for the next scheduled meeting to begin conversations about an issue. Each board member brings a wealth of knowledge and experience to the organizations they serve, and when appropriate, engaging them individually may provide timelier, mission-focused strategies that can later be presented to the full board.

3. Keep board members informed between formal meetings and informal meetings. Some nonprofits have created dashboards or a one-page summary which they upload onto a board portal for their board members every month that highlights their priorities, challenges, proposed strategies and financial health,

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as this can be helpful between the formal and informal scheduled meetings. This dashboard or summary gives those charged with governance a timely snapshot into both the financial and programmatic performance of the organization and allows board members to formulate more pointed questions and offer their expertise more frequently. The uncertain environment, coupled with ever-changing available information, makes the need for timely communication with board members imperative.

4. Re-assess your systems, controls and processes in this new environment. The global pandemic has not only changed where and how we work — it has also highlighted the need to revise long-standing processes and procedures to increase the efficiency and timeliness of both operational and financial information flow. Thus, it's key for organizations to step back and assess their systems, controls and processes.

For example, if management has to manually prepare reforecasting every month and systems and processes are not set up efficiently, management will be more prone to errors and delays. Since accuracy and timeliness are critical to credibility, open, honest communication with board members about the need for updated systems, changes in personnel and revisions to processes and procedures is essential. This kind of dialogue will facilitate trust and allow for collaboration between board members and management to find the solution that is best for their organization — not only to address the issues at hand, but also to ensure the organization will continue to thrive in this evolving virtual and technology-driven landscape.

5. Don't be afraid to engage an expert. Today's world is filled with all kinds of opportunities, disruptions and crises. There are professionals who are trained to assist management as subject matter experts and can help facilitate engaging conversations amongst board members and management. These professionals can also help identify key metrics, inputs and assumptions during a session with board members and management, and can share industry expertise and draw on their experience with other organizations to provide tailored solutions. The decision-making ultimately resides with the board of directors and management, but these groups shouldn't shy away from engaging their advisors (bankers, auditors, consultants, etc.) and other experts to help navigate disruption.

6. Be flexible and agile. Change may seem uncomfortable at first, but it is key for management and board members to embrace it with an open mind. In addition to assessing day-to-day needs, boards should evaluate the breadth and depth of expertise their members bring to the organization and consider adding new qualified members to fill any gaps. For organizations that plan to continue some degree of remote work, it may even be possible to onboard members who live in different regions of the country. The future of work is changing — and management, as well as board members past and present, must adapt and communicate effectively to help their organizations meet their goals.

As we look ahead to the post-pandemic era, communication among board members and management will be critical to nonprofits' ability to thrive. Organizations should look for ways to foster synergies, improve processes and unite board members and management so they're able to deliver on their missions no matter the challenges ahead.

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