Institutional Advisors

Meaningful Board Engagement

Cynthia J. McDonald, CTFA, ChSNC®, National Director, Philanthropic Advice

Boards are continuing to evolve to meet the needs of organizations at all levels. What does that look like overall? Board members are actively advancing the mission between meetings, not just showing up and rubberstamping the agenda but shifting from attendance to meaningful contribution.

A meaningful board goes beyond oversight and compliance to provide active, strategic engagement that helps shape the future of the organization. Effective board members come to meetings prepared, having reviewed materials thoughtfully and developed perspectives rather than simply reading reports passively. They stay engaged between meetings by connecting with the CEO, Executive Director, or board chair to test ideas, explore emerging challenges, and offer insight. They participate in strategic sessions, board retreats, and working groups, contributing their expertise where it can have the greatest impact.

Most importantly, they ask forward-looking questions such as, "What are we not seeing? What should we stop doing? What do we need to do more of?" Rather than merely reacting to information after decisions are largely formed, engaged board members play a vital role in influencing strategy early, helping the organization identify opportunities, address risks, and make stronger decisions for the future.

What does that look like in practice? How can you help create a board that truly understands the mission and has the drive to help sustain, grow, and move forward?

Not just oversight but strategic engagement:

- Preparing for meetings by reviewing materials and forming perspectives, not just reading passively
- Reaching out to the CEO, Executive Director, or board chair between meetings to test ideas or explore challenges
- Participating in strategy sessions, retreats, or working groups
- Asking forward-looking questions such as:
  – What are we not seeing?
  – What should we stop doing?
  – What do we need to do more of?

> Instead of reacting to reports, engaged board members help shape decisions early, when strategy is still forming.

Building relationships and representing the organization externally:

- Making introductions to:
  – Potential donors
  – Potential new board members
  – Corporate partners
- Hosting or attending small gatherings to tell the organization's story
- Advocating publicly (and privately) for the mission
- Connect the organization to a foundation that supports similar causes

> Fundraising then shifts from "asking for money" to building trust-based relationships and transparency.

Building strong relationships and serving as a representative for the organization are among the most valuable contributions a board member can make. Engaged board members help expand the organization's reach by making introductions to potential donors, prospective board members, corporate partners, and foundations whose philanthropic priorities align with the mission. They also support visibility and awareness by hosting or attending small gatherings where they can share the organization's story, impact, and vision with others.

Through both public advocacy and private conversations, they champion the mission and help build credibility within their networks. When board members actively connect people, resources, and opportunities to the organization, fundraising becomes less about asking for money and more about cultivating trusted relationships, demonstrating impact, and fostering long-term partnerships grounded in transparency and shared purpose.

Committee work between board meetings:

- Actively participating in committee work (not just lending your name)
- Taking ownership of specific initiatives:
  - Capital campaign planning
  - Strategic partnerships
  - Program expansion feasibility

> Committees do the deep thinking and groundwork, so full board time can focus on decisions.

Partnership with leadership:

- Serving as a sounding board for the CEO, Executive Director, or program/team managers
- Offering expertise in your domain:
  - Finance, legal, technology, HR, governance, or marketing
- Helping leadership think through complex trade-offs:
  - Growth versus sustainability
  - Innovation versus risk

> Board members can provide insight without interference.

Ongoing education:

- Staying informed on:
  - Policy changes that directly affect the organization
  - Philanthropic trends
  - Technology (AI, data, cybersecurity)
- Participating in board education sessions
- Sharing relevant articles or insights with peers

> The difference in this new age is that boards should be learning systems, not static groups.

Supporting talent and leadership:

- Investing in the CEO/Executive Director's success:
  - Coaching
  - Feedback
- Supporting leadership development across the organization
- Participating in CEO/Executive Director evaluation and succession planning

> Solid board members build leadership capacity, not just evaluate it.

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Accountability as a board member:

- Following through on commitments
- Participating actively in discussions (not silent attendance)
  - Being clear about how you're contributing — "Here's what I'll take on this quarter."

Organizations are working with boards to define individual engagement plans and commitments. This can be easily accomplished through surveys or one-on-one conversations.

Board engagement as a continuous cycle:

Before board meetings:

- Prepare
- Reflect
- Form insights

During board meetings:

- Engage in discussion
- Ask questions
- Make decisions

Between meetings — the biggest shift!

- Build relationships
- Advance committee work
- Support leadership
- Stay informed

Nonprofit board engagement is a continuous cycle rather than a series of isolated responsibilities. Effective board members begin by understanding the organization's mission, strategy, and challenges through active participation and thoughtful preparation. They engage in meaningful dialogue with leadership, contribute to strategic planning, and help shape important decisions before they are finalized. From there, they extend their impact beyond meetings by leveraging their networks, making introductions to potential donors, partners, and future board members, and serving as advocates for the organization's mission.

These relationships generate new opportunities, resources, and insights that strengthen the organization and inform future strategic discussions. As outcomes are evaluated and new challenges emerge, the board continues the cycle — learning, advising, connecting, advocating, and refining strategy. When board engagement operates as an ongoing cycle of governance, strategy, relationship-building, and accountability, the organization is better positioned to advance its mission and achieve long-term success.

Low Engagement	Meaningful Engagement
Attends meetings	Prepares and contributes strategically
Reviews reports	Interprets and questions
Donates annually	Builds relationships and opens doors
Listens passively	Engages in dialogue and debates
Limited contact with staff	Serves as a thought partner to leadership
No activity between meetings	Active in committees, outreach, and learning

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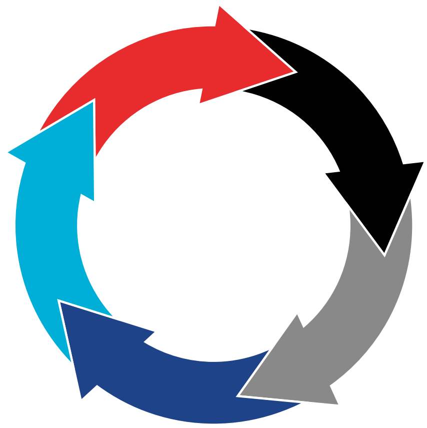
Continuous Cycle of Board Engagement



Evaluate & Steward
Monitor outcomes, assess performance, and ensure accountability

Learn & Understand
Develop a deep understanding of the mission, programs, finances, opportunities, and challenges

Resource & Support
Help secure the resources needed for success

Engage & Strategize
Provide strategic guidance and help shape decisions before they are finalized

Connect & Advocate
Leverage networks and influence to advance the mission

A highly engaged board member might, in each quarter:

- Join at least one committee meeting and actively contribute
- Make 2 – 3 strategic introductions
- Participate in at least one learning session or share insights
- Attend a program, visit, or donor conversation
- Check in once with the CEO, Executive Director, or board chair
- Come to the board meeting ready to discuss, not just listen

Meaningful engagement equals visible contribution to the mission between scheduled meetings.

It's not about doing more for the sake of it but about ensuring every board member is:

- Using their expertise
- Leveraging their networks
- Thinking strategically
- Actively advancing the organization's goals

KeyBank Institutional Advisors collaboratively engages stakeholders to understand their organization's strategic mission, values, and goals. Our advisors are professionals supported by subject matter experts across client disciplines/market segments. Combining our expertise with an understanding of the client, we recommend and implement customized, coordinated financial solutions.

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