

Guide to creating a monthly board update

What is a board update?

A regular board update is a personal communication from the president or chief executive officer of the school to members of the board. Its tone and style reflect the personality of the president, her/his relation to the board, and the character of the school. Mindful of the rich diversity in all of those variables, this template is a suggestion for items that may be included in regular communications to the board.

What is the goal of a board update?

The goal of the communication is two-fold:

- To inform the board about what is happening at the school, particularly things that relate to their governance responsibilities.
- To inspire board members to feel more connected to the good work of the school and their part in it.

Time is the board's most precious resource, and this communication should give them reason to feel that the time they give to the school on the board is time well spent, even if the news is not all positive.

How to begin

1. Be transparent and truthful

A board update is not about spin or cheerleading. Board members need to know the bad and the good. Let them know bad news before they hear it elsewhere. Board members often need help knowing how to contextualize and interpret news about the school, both good and bad. What do current news and trends mean for the school and its mission? How is the school working to continue the good that it exists to do?

2. Connect to your mission

The most important responsibility of the board is stewardship of the mission. Hence, connections should be made between the items in the update and the mission. This connection does not need to be made explicit in every case, but whether implicit or explicit, that connection should be clear to the president who writes the update, and occasionally the specific connections between the news and the mission should be made clear.

3. Layout

A board update is most likely to be an e-mail communication rather than a traditional letter. This enables the use of links that the reader can follow for further information, for more complete explanations of or actual reports on some topics, and to outside resources.

4. Be brief

Many readers won't read all the way to the end. If a reader only reads the first screen and does not scroll down, what is the most important information to communicate?

5. Schedule the updates

Not everything needs to be said in every update. While consistency in format can be helpful to readers, overly repetitive presentations can lead them to tune out. If you decide that some information needs to be repeated from one month to the next, explain why.

Since many things at a school happen on a predictable academic calendar, plan out a general "syllabus" of monthly communications for the year. In the yearly rotation, find a place for regular board actions, seasonal events, and upcoming events like accreditation visits, capital campaign launches, and strategic planning sessions.

6. The information below is arranged under three major headings

One way to structure a monthly communication is to include headings for

- Achievements and Challenges
- Management Data
- Events

But there are a variety of alternative ways to organize information as well, such as by vice presidential or other administrative divisions, by board committee responsibilities, or by strategic plan goals. It is a good practice to discuss the content and even the format of the board update with the board chair or the executive committee. In considering format, leading with academics can be a tacit reminder of central identity and mission.

In the example below, the first three items should be one paragraph each, with any supporting details included in subsequent paragraphs of the communication. Depending on circumstances, the stories you have to tell in a particular month, and how long it takes to tell them, you may want to choose between ¶2 and ¶3 rather than including both. They are both listed here as a reminder that they are two quite distinct types of stories.

Sample communication from the president to the board

From: Martha Pontificano, President

Sent: April 01, 20XX

Subject: Holy Graduates Seminary — March board update

Dear board members:

1. Personal Greeting. Connection to liturgical season, cultural event, school event (new semester/graduation), significant event in the life of a board member, etc.

2. Story from the school. Human interest story about a student, graduate, faculty member, or staff member. The point is to give a real-life demonstration that the school is doing meaningful work — the kind of work that board members want to know they are part of making happen.

3. Highlight one activity, accomplishment, event at the school that it's important for board members to know about. Depending on the situation, this may be a success, a setback, an unexpected difficulty in achieving some goal, or an unexpected benefit like a gift or a grant.

4. Overview of significant achievements or challenges. This and the following sections are more comprehensive reviews. They may include institutional achievements or challenges (such as an accreditation report accepted, a degree program approved by faculty, a marketing program launched, broken pipes fixed) or achievements or challenges connected to individual faculty, staff, students or graduates.

5. Overview of institutional or management information such as admissions and enrollment, marketing, budget, fundraising, and physical plant. Some schools have a dashboard that tracks such information, usually providing metrics requested by the board.

6. Information about events or happenings at the school, highlighting those that have an opportunity for board involvement. These may include off-campus events such as regional alumni gatherings, faculty/staff presentations, or scheduled guest preaching by faculty or the president. General outreach activities are noteworthy, both to show what is being done and how the school is working to carry out its mission beyond the campus. The travel schedule of the president, director of development, or director of admissions may be of particular interest.

If the travel schedule of administrators or the faculty is too long to include, then a few highlights can be mentioned along with a link to the full calendar on the school's website. The principle for what to include: Any event about which a board member might say, "I wish I had known about that. I might have attended."

7. Board-specific events and tasks such as upcoming meetings, retreats, or thank you calls to donors, orientation, or meetings between new members and mentors. Customize these so that the information about meetings and tasks go only to those involved. Customizing the communication makes the letter feel more personal and professional.

8. Closing with expression of gratitude for the work of the board on behalf of the school.

By William Cahoy, dean emeritus at St. John's School of Theology and Seminary in Collegeville, Minnesota.



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