

The Expanding Role of Board Professionals

BY MERRILL P. SCHWARTZ

As the work of governing boards has grown more complex, so have the demands on college, university, and foundation employees who support them. Board professionals must be more experienced and better educated than in the past, according to a recent survey—developed by AGB’s Board Professionals Leadership Group—about their typical responsibilities, demographic characteristics, and professional-development needs.

AGB sent the survey to 1,233 AGB-member board professionals in April 2010, and 406 completed it (a response rate of 32.9 percent). Of those respondents, 64.9 percent were from independent colleges and universities, 30.9 percent were from public institutions, and 4.5 percent were from institutionally related foundations. The survey findings may be of interest to board leaders and presidents, as well as board professionals, as they consider the changing nature of board work and the skills needed to accomplish board goals.

A Profile of the Board Professional

Board professionals occupy a wide variety of positions, such as administrative assistant, executive assistant, vice president and general counsel, chief of staff, and secretary of the college. At some institutions, only one or two people support the board, while others have many board professionals serving in various positions and levels of responsibility. Some board professionals report to the board, some to the president, and some to both. The size and resources of the institution, whether it’s public or independent, and the traditions that have developed over time are a few of the factors that influence the role of the board professional. In all their variations, board professionals are the often invisible hands that enable presidents and board members to accomplish the work of the board.

According to the 2010 survey, the typical board professional is a white woman in her fifties, with a master’s degree, who has served in her current position for more than four years and worked for the institution in a prior position. Of the respondents, 87.6 percent were white and 10.4 percent were minorities (2 percent did not identify race),

while 83.8 percent were women and 16.2 percent were men. The largest number (40.6 percent), were between the ages of 50 and 59. Half of them had earned a master’s or higher-level degree; 58.8 percent were recruited from within the institution; 38.3 percent had been in their current position between four and nine years; and about the same number (37.5 percent) had been in their current position for a decade or more. Most board professionals, 80.8 percent, had other titles and responsibilities; only about 10 percent devoted all of their time to board matters.

Compared to a survey conducted in 2005, the gender and ages of board professionals were much the same. (Data on race were not collected then.) What has change significantly since that survey is that more board professionals in 2010 have earned degrees of every type: associates (15.2 vs. 10 percent), bachelors (34.8 vs. 29 percent), master’s (23.7 vs. 14 percent), law (7.6 vs. 3 percent), M.B.A. (6.1 vs. 5 percent), and doctorate (12.6 vs. 10 percent). And more board professionals have served in their current position for a decade or longer (37.5 vs. 35.4 percent).

Growing Expectations

In response to the question, “In recent years, in what ways has the board professional position become more complex at your institution?” more than half of respondents reported: increased expectations (60.6 percent), increased levels of documentation requested by the board (56.3 percent), increased numbers of policies and review

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How many years have you held your current position?

Answer Options	Response Percent	Response Count
3 years or less	24.3%	97
4 to 9 years	38.3%	153
10 to 15 years	22.5%	90
More than 15 years	15.0%	60



**In recent years, in what ways has the board professional position become more complex at your institution?
(Check all that apply)**

Answer Options	Response Percent	Response Count
Increased expectations	60.6%	215
Increased levels of documentation requested by board	56.3%	200
Increased number of policies and review process	56.1%	199
Increased levels of transparency	55.5%	197
Increased competencies in board governance needed	54.4%	193
Increased number of committees of the board	40.0%	142
Increased scrutiny by campus, media, and/or public	29.3%	104
Increased level of board independence	20.8%	74
Increased requests from public for information	16.3%	58
Other		40

processes (56.1 percent), increased competencies in board governance needed (54.4 percent), and increased levels of transparency (55.5 percent). Comments about the changing nature of board work included: “Increased complexity of the issues and the decisions required,” “Greater sophistication in nominating and board evaluation,” “Increased availability of information in multiple forms (online, electronic, print),” “Increased use of technology for board materials and meeting attendance options,” and “Increased responsibilities for improving board effectiveness including board assessments, increasing strategic level of board meetings/discussions, trustee searches, and review of governance structure.”

Professional-Development Needs

In the area of professional development, the top five areas of interest to board professionals were:

- Using technology to enhance communication or efficiency (65.8 percent);
- Trustee orientation (61.8 percent);
- Managing the board and/or president’s office (57.8 percent);
- Writing board minutes (52.4 percent); and
- Board governance (50.8 percent).

Interest in learning more about using technology, at the top of the list, may reflect a relatively new trend in conducting “paperless” board meetings as well as the barrage of new devices and applications for communicating, organizing, and archiving information. In a related survey question, 44.3 percent

of respondents replied that all or almost all board members received only printed board materials for board meetings, 43.8 percent reported that board members received a mix of printed and electronic materials for board meetings, and a mere 12 percent reported that board members received their board meeting materials electronically only. As boards pursue more sophisticated (and “green”) electronic communication options, board professionals will need to master the technology needed to support these changes. Trustee orientation, office management, board minutes, and board governance are all essential and continuing responsibilities, rounding out the list of top five interests.

Sixth on the list was committee structures and board organization, mentioned by 40.1 percent of respondents. This is not surprising given the importance of committee work and the near universal responsibility (91.9 percent) board professionals have for supporting logistics for committee meetings. In addition, 40 percent of board professionals reported that there had been an increase in the number of board committees in recent years.

You can find the complete survey results on the Board Professionals’ pages at www.agb.org, as well as connect with other board professionals through the AGB Board Professionals Network, a members-only social networking group, and through the newsletter for board professionals published online three times a year.

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