

# 2015 Survey of Board Professionals

Who They Are, What They Do, and  
Their Important Role in Governance



A Report by the Association of Governing  
Boards of Universities and Colleges

# 2015 Survey of Board Professionals

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## About AGB

Since 1921, the Association of Governing Boards of Universities and Colleges (AGB) has had one mission: to strengthen and protect this country's unique form of institutional governance through its research, services, and advocacy. Serving more than 1,300 member boards, 1,900 institutions, and 40,000 individuals, AGB is the only national organization providing university and college presidents, board chairs, trustees, and board professionals of both public and private institutions and institutionally related foundations with resources that enhance their effectiveness.



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## Acknowledgments

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## Introduction: 2015 Survey of Board Professionals

Nearly every college, university, or system governing board has at least one or more staff members who provide critical support, planning, and coordination of important board functions. These staff members, otherwise known as “board professionals” (BPs), frequently wear many hats and are most often the direct point of contact for the board. They manage the day-to-day mechanics of the board’s operations, ranging from coordinating meeting schedules for the full board and various subcommittees to providing research and resources on governance best practices. Many board professionals also serve in roles as diverse in responsibilities as they are in titles, including assistant to the president, general counsel, secretary of the college, assistant secretary of the board, vice president, and chief of staff. Their work is often unheralded and conducted behind the scenes, but it is critical to the success and performance of the board.

The Association of Governing Boards of Universities and Colleges (AGB) has long acknowledged and supported the important role that BPs play in fostering effective institutional governance by creating programs, resources, workshops, and networks to help facilitate the work they do. As part of these efforts, for nearly 25 years, since 1991, AGB has surveyed this group to capture the changing nature of their roles over time. The *2015 Survey of Board Professionals*, a follow-up to a study conducted in 2010, sought to learn more about several

other dimensions of their roles, including their reporting relationships, compensation, years of experience, and more. The survey was administered electronically to approximately 1,500 board professionals of independent and public institutions, university systems, and institutionally related foundations. A total of 349 individuals completed the survey for a response rate of 23 percent. The majority of respondents were from either independent nonprofit institutions (52 percent) or public institutions and systems (34.2 percent.) (See Table 1.)

Table 1: Board Professionals by Sector

Sector	%
Public Institutions (including systems)	34.2%
Independent nonprofit institutions	52.0%
Private for-profit institutions	8.7%
Institutionally related foundations	5.1%

In many ways, the *2015 Survey of Board Professionals* reflects what is happening in higher education generally. With constrained resources, board professionals are being asked to do more with less. They report that their roles have intensified as they are assigned more responsibilities, are tasked with providing their boards with greater levels of information, and are required to have greater expertise in governance. Recognizing the need for innovation in the sector, many board professionals also reported driving strategic change at their institutions by

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leading policy and advocacy efforts on campus. The increasingly important role that board professionals play highlights the need for skilled specialists to serve in these positions. AGB's 2014 report, "Consequential Boards: Adding Value Where It Matters Most," calls on boards to address the issues of greatest consequence to their

institutions or systems in a much more strategic, intentional, and thoughtful manner than they have in the past. Board professionals will play a fundamental role in helping the board and chief executive achieve these goals.

In the report that follows, a detailed profile of today's board professional is provided.

## Demographic Profile

Board professionals continue to be a fairly homogeneous group, both in terms of gender and race/ethnicity. Since 2010, this trend has not changed much. Women make up the majority (87.3 percent) of the responding board professionals. (See Figure 1.) Within that group, most women identified as Caucasian (87.4 percent). (See Table 2.)

Figure 1: Board Professionals by Gender

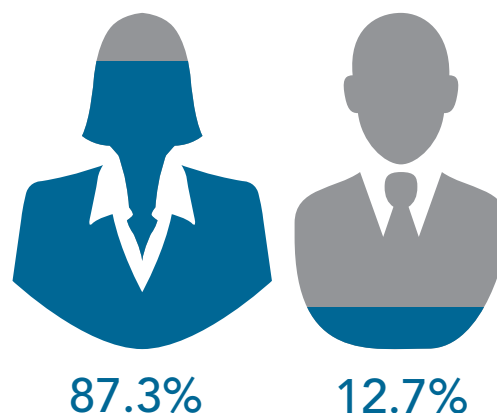


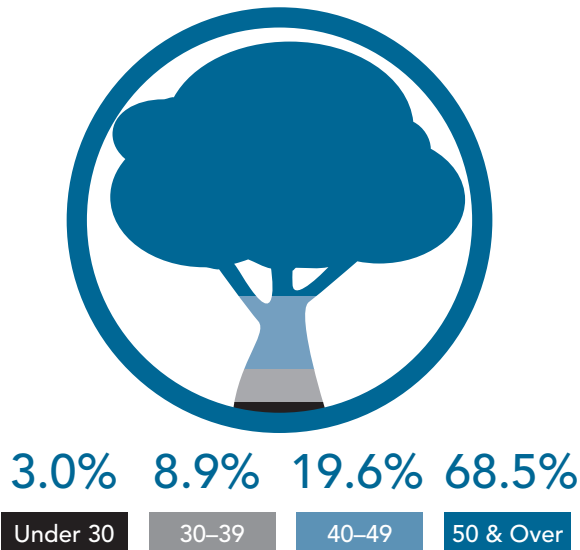
Table 2: Board Professionals by Gender and Race/Ethnicity, 2015 and 2010

	2015		2010	
Race/Ethnicity	Male	Female	Male	Female
Caucasian	92.9%	87.4%	85.7%	88.5%
African American/Black	2.4%	3.8 %	7.9%	5.1%
Asian/Pacific Islander	2.4 %	1.0%	3.2%	1.2%
Hispanic	0.0%	4.1%	0.0%	3.0%
Multi-racial	0.0%	1.0%	0.0%	0.6%
Prefer not to respond	2.4%	2.7%	3.2%	1.5%
TOTAL	100%	100%	100%	100%



Most board professionals—over two-thirds (68.5 percent)—are also members of the baby boomer generation (over the age of 50). (See Figure 2.)

Figure 2: Board Professionals by Age



We see the most diversity among BPs in their educational backgrounds. A little over one-third (35.3 percent) hold a bachelor's degree and nearly one-quarter (22.7 percent) hold a master's degree. (See Table 3.) While most reported that they

hold some form of post-secondary credential, others (8.3 percent) reported that they have some college, specialized training and certifications, or a high school diploma.

Table 3: Board Professionals by Level of Education

Level of Education	%
Associate	13.8%
Baccalaureate	35.3%
Master's (other than business or law)	22.7%
Juris Doctorate	6.4%
Masters of Business Administration	6.4%
Doctorate	7.1%
Other	8.3%

*Most board professionals—over two-thirds—are also members of the baby boomer generation (over the age of 50).*

Figures may not add up to 100% due to rounding.

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## Taxonomy of Board Professional Roles

The role of the board professional is as complex as it is complicated. While position titles and the scope of duties may vary greatly from one institution, system, or foundation to another, there are generally some standard characteristics that define the most common types of roles and board-secretariat functions. Board secretariat broadly entails oversight of the procedural and administrative functions of the governing board. For the purpose of this survey, four categories of BP roles were defined:

### **Secretary to the Board and Presidential Assistant:**

One who is assigned responsibility for the board-secretariat function, but who also carries the title and responsibility of a special assistant or executive assistant to the chief executive officer of the institution.

### **Secretary of the Board and Senior**

**Administrator:** One who is assigned the board-secretariat function, but with additional responsibilities to the institution, for example secretary of the university, chief of staff, development officer, legal counsel, vice president in a functional area with line responsibilities, or legislative advocate for the institution.

**Corporate Secretary:** One whose primary responsibility is for the board-secretariat function, including broadly delegated authority as an officer of the corporation. This may include the execution of legal documents, either by acting alone or in concert with the chairman of the board. In some institutions, this officer is appointed by and reports solely to the board; in other institutions, he or she may report to or be a member of the chief executive officer's cabinet.

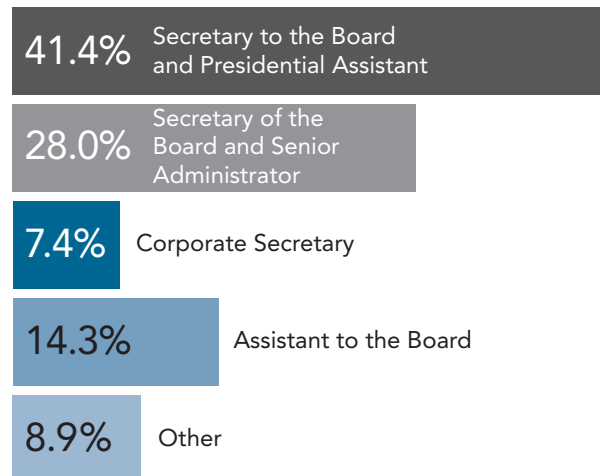
**Assistant to the Board:** One who is assigned responsibility for assisting the board-secretariat function, but who also carries the title of assistant or associate to the primary administrative liaison to the board.

Among all respondents, approximately 41.4 percent said their role most closely matches that of the *secretary to the board and presidential assistant*. Over one-quarter (28 percent) hold a dual role as *secretary of the board and senior administrator*. (See Figure 3.) Among those who also assume a senior administrator role, when asked to report their exact title, many reported chief of staff (22.5 percent), vice president (17.4 percent), general counsel (11.2 percent), or director (22.5 percent).

*The role of the board professional is as complex as it is complicated.*



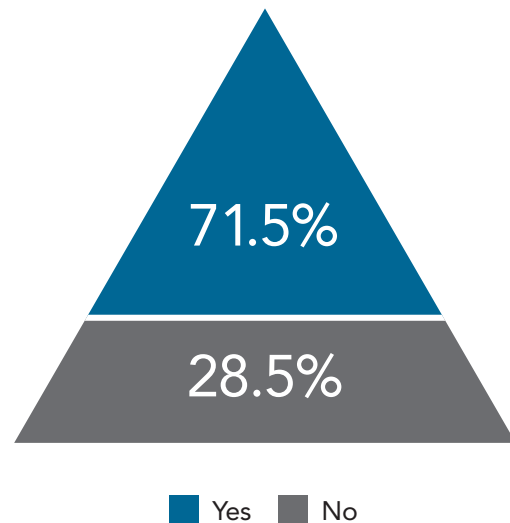
Figure 3: Board Professionals by Institutional Role



Most of the responding BPs (71.5 percent) indicated that they are the highest-ranking board professional in their office, which may include a staff of individuals who serve the board and carry some variation of the title “board professional.” (See Figure 4.) The exception would be those who define their role as assistant to the board. The highest ranking BPs supervise, on average, one to two staff members in their offices.

Figure 4: Board Professionals by Board-Role Ranking

*Are you the Highest Ranking Board Professional?*



*There's no singular career pathway leading to the role of board professional. Most board professionals assume their roles with a broad range of skills and past experiences.*

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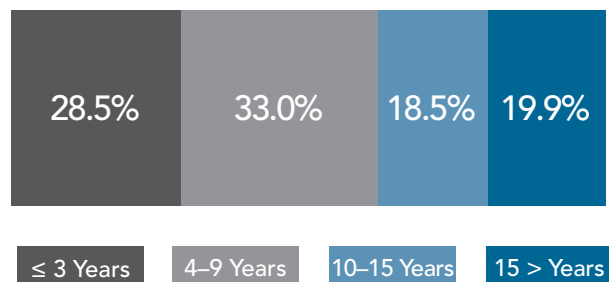
## Pathways Leading to the Role

There's no singular career pathway leading to the role of board professional. Most board professionals assume their roles with a broad range of skills and past experiences. In many cases, these past professions aren't always directly tied to governance. Some of the roles previously assumed by current board professionals include alumni relations officer, private attorney, academic dean, vice president, independent consultant, and business owner. The professional backgrounds of BPs who serve institutionally related foundations are a bit more homogeneous, as nearly half reported that they had previously served in some sort of finance or development role.

Although there is great variation in the types of roles previously held by many board professionals, over half (58.3 percent) were recruited from within their institution for their current role, while nearly 17.5 percent were recruited from outside of the institution in a national or regional search. All others reported that "board work" was a component of their original job description. By sector, a larger proportion of BPs from public institutions or system offices (64.2 percent) said they were recruited from within. (See Table 4.)

The turnover rate for BPs appears to be fairly low. Most of the responding board professionals are reasonably seasoned in their roles. Overall, one-third (33 percent) have served in their current capacity for four to nine years. Another 18.5 percent have served 10 to 15 years, and nearly 20 percent are veteran BPs who have served in their roles for more than 15 years. (See Figure 5.)

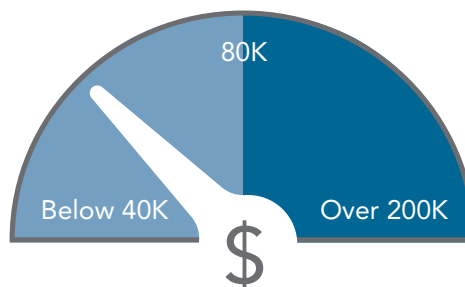
Figure 5: Board Professionals by Years in Current Position



Salary ranges for board professionals, not surprisingly, vary by type of board professional role. Half of all board professionals' salaries fall within the range of \$40,000 to \$80,000. (See Figure 6.) Those who assume the role of *secretary of the board and senior administrator* are more likely than their peers to earn a salary over \$100,000. (See Table 5.)

Figure 6: Board Professionals by Salary

*Half of all board professionals' salaries fall within the range of \$40,000 to \$80,000*







**Table 4: Board Professionals by Recruitment and Institution Type**

Type of Recruitment	Public Institutions and Systems %	Independent nonprofit institutions %	Private for-profit institutions %	Institutionally related foundations %	Overall %
Recruited from within the institution	64.2%	59.3%	39.3%	41.2%	58.3%
Identified and recruited as the result of a regional search	12.8%	9.6%	25.0%	23.5%	12.8%
Identified and recruited as the result of a national search	5.5%	4.2%	3.6%	5.9%	4.7%
Other	17.4%	26.9%	32.1%	29.4%	24.3%
<b>TOTAL</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>

**Table 5: Board Professionals by Salary and Institutional Role**

Salary Range	Secretary to the Board and Presidential Assistant %	Secretary of the Board and Senior Administrator %	Corporate Secretary %	Assistant to the Board %	Other %	Overall %
Below \$40,000	9.5%	1.1%	0.0%	13.6%	6.9%	6.7%
\$40,000–\$59,999	32.1%	6.3%	8.0%	40.9%	27.6%	23.6%
\$60,000–\$79,999	35.8%	10.5%	20.0%	31.8%	31.0%	26.4%
\$80,000–\$99,999	11.0%	19.0%	16.0%	6.8%	13.8%	13.3%
\$100,000–\$124,999	5.1%	21.1%	12.0%	2.3%	3.5%	9.7%
\$125,000–\$149,999	3.7%	14.7%	20.0%	0.0%	17.2%	8.8%
\$150,000–\$174,999	2.9%	8.4%	4.0%	2.3%	0.0%	4.2%
\$175,000–\$200,000	0.0%	13.7%	12.0%	2.3%	0.0%	5.2%
Over \$200,000	0.0%	5.3%	8.0%	0.0%	0.0%	2.1%
<b>TOTAL</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>

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## Reporting Relationships and Responsibilities

Several types of reporting relationships exist among board professionals, with some modest changes observed since 2010. Over half (55.6 percent) report directly to the chief executive of their institution or system, down slightly from nearly two-thirds (61.3 percent) in 2010. Most others report to both the board chair and the chief executive (24.0 percent, down from 27.3 percent in 2010). (See Table 6.)

**Table 6: Board Professionals by Reporting Relationship**

To whom do you officially report?	2015	2010
	%	%
Board chair	3.8%	7.1%
Chief executive	55.6%	61.3%
Both board chair and chief executive	24.0%	27.3%
Board secretary/chief board professional	7.1%	4.5%
Other	9.5%	—*
<b>TOTAL</b>	<b>100%</b>	<b>100%</b>

\*“Other” was not an option in 2010. All other response options differed slightly between 2010 and 2015, so percentage differences may not be as great as they appear.

In their day-to-day work, most board professionals engage in a range of activities to support the work of the chief executive, board chair, and the entire board. The top 10 most frequently cited tasks are detailed in Table 7.

**Table 7: Responsibilities Assumed by Board Professionals**

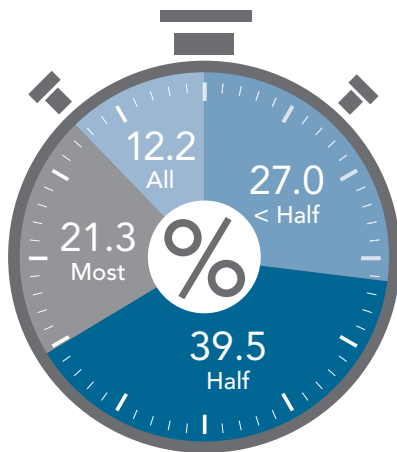
Responsibilities Assumed in Your Role as Board Professional	%
Draft, edit, and/or approve board meeting minutes	96.5%
Plan and manage board meetings (e.g., develop agenda, provide staff support, etc.)	94.7%
Coordinate board retreats and other events	90.6%
Manage storage and retrieval system for board documents	90.1%
Draft, review, or revise items for board action (e.g., resolutions, etc.)	89.2%
Plan orientation or orient new board members	82.5%
Plan and manage committee meetings (e.g., develop agenda, provide staff support, etc.)	81.9%
Plan and staff off-site board member retreats	79.5%
Draft, edit, and/or approve committee meeting minutes	78.9%
Manage the review and revision of bylaws and other governance documents	77.2%



In addition to many of the administrative and logistical tasks associated with their role, a number of board professionals reported that they also help to drive strategic change, provide counsel or advice to the president or board chair, and manage board engagement and legislative advocacy efforts.

Though the day-to-day activities of the average board professional run the gamut, from preparing meeting notes to managing bylaw revisions, most board professionals only engage in board-related activities half of the time. Two-thirds (66.5 percent) reported that they spend half or less than half of their time on board matters. (See Figure 7.)

**Figure 7: Percentage of Time Devoted to Board Work**



Given the complexity of their roles, it's no surprise that many board professionals have responsibilities beyond those directly in support of their board. Over three-quarters (78.8 percent) report that they perform many other functions within their institution, system, or foundation. Some of those additional responsibilities include administrative support to the chief executive, advancement and development-related tasks, human resources and staffing, event planning, and office management.

*In their day-to-day work, most board professionals engage in a range of activities to support the work of the chief executive, board chair, and the entire board.*

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## The Evolution of the Role and Future Needs

Among board professionals who have served in their role for four or more years, many said that the responsibilities required of their positions have become more complex in recent years. Nearly 65 percent reported that there's been an uptick in various requests for information from their boards. Over half (56.4 percent) reported that they have more responsibilities than in the past, and half (50.6 percent) also indicated that a growing need exists for increased competencies in understanding the nuances of board governance. Only 13 percent indicated that the complexity of their role has remained the same. (See Table 8.)

*In the future, many BPs are hoping to engage in additional professional development, not just related to managing the logistical planning for their board offices, but also on other important top-level governance topics their boards are currently addressing.*

**Table 8: Changes in Roles and Responsibilities after Four or More Years**

Changes in Role Over Time	%
Increased levels of information requested by board	64.7%
Increased number of responsibilities for the role	56.4%
Increased levels of transparency	55.2%
Increased number of policies and review processes	54.4%
Increased competencies in board governance needed	50.6%
Increased number of committees of the board as well as demands/needs of the committee	43.2%
Increased scrutiny by campus community, media, and/or public	30.3%
Increased demands to report to state and federal agencies regarding compliance on issues	29.5%
Increased requests from public for information	17.0%
N/A The level of complexity for the role of the board professional has remained the same	12.9%
Other	2.5%



Because of the changing demands in their profession, most board professionals (71.1 percent) have sought out some form of professional development—from webinars on salient higher education issues (27.9 percent) to conferences about higher education governance (39.5 percent)—in an effort to be more-effective leaders in their roles. (See Table 9.) For those who did not engage in any form of professional development, the most cited reasons for not doing so were time (48.4 percent) and money (28.4 percent).

**Table 9: Types of Professional Development**

Types of Professional Development	%
Conferences or meetings about college and university governance	39.5%
Conferences or meetings about issues of importance in higher education	38.3%
Specialized trainings to enhance my job functions or responsibilities	33.5%
Webinars on issues of importance in higher education	27.9%
Webinars on college and university governance	22.0%
Other	5.3%

In the future, many BPs are hoping to engage in additional professional development, not just related to managing the logistical planning for their board offices, but also on other important top-level governance topics their boards are currently addressing. These topics include committee structures (38 percent), board recruitment (37.1 percent), and fundraising (22.6 percent). (See Table 10.)

*Among board professionals who have served in their role for four or more years, many said that the responsibilities required of their positions have become more complex in recent years.*

**Table 10: Future Professional Development Interests**

Professional Development Interests	%
Using technology to enhance communication or efficiency	57.3%
Managing the board and/or president's office	54.9%
Trustee orientation	51.0%
Board governance	48.7%
Benchmarking and dashboards for boards	46.9%
Committee structures and board organization	38.0%
Board recruitment, retention, and development	37.1%
Writing board minutes	34.1%
Board's role in fundraising	22.6%
Legal updates	18.1%
Event planning	17.8%

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## Conclusion

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An understanding of the complexity of the board professional role and the impact of such positions on institutional governance cannot be achieved simply by articulating the job's day-to-day functions. This cadre of higher education professionals plays an important role in ensuring that the management of board governance is well executed, whether by planning and coordinating board and staff retreats, orienting new board members, or managing committee meetings. The complexities of the job have increased, demanding greater competency in and understanding of the nuances of governance. High-performing institutions need high-performing boards, and board professionals in many ways are

integral to that relationship. Board professionals can help to advance the work of the board, especially in addressing fundamental best practices in governance, including board restructuring and improving board culture. For the future of the profession, and for the effective governance of our institutions, more intentional efforts to build career pipelines, provide professional development opportunities, and foster strategies to diversify the field are needed.

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