

PRESIDENT TO PRESIDENT

IEWS ON TECHNOLOGY IN HIGHER EDUCATION

EDITED BY: JACQUELINE POWERS DOUD, MARYLOUISE FENNELL, AND SCOTT D. MILLER

Chapter 1

SunGard Higher Education
Council of Independent Colleges

Beyond the Board Book: Internet Communication with Trustees

By President Theodore E. Long, Elizabethtown College

It was a new trustee who first suggested it. "Let's post all this material electronically so I can work off my laptop instead of lugging this big book of paper around to every meeting. It should be pretty simple to do," she said, "and it will be a lot easier to do board work." Six years later, what began as a matter of trustee convenience and saving paper has become a new center for board communication. Our conversion from paper to electronic communication did save trees and made things easier. But what we discovered – and are still learning to exploit – is that internet communication enables our board to work differently, not just more conveniently. It has changed the way we do business at Elizabethtown. Using our experience as background, this chapter describes those new possibilities, reviews their advantages, and lays out some principles for exploiting this tool successfully.

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Web-Based Communications

Accessed via the College's web site, our board communications center is housed on our Blackboard utility, with password secure access for trustees and the College's senior leadership. That site contains a variety of documents, information and functions:

- ❑ A roster of members,
- ❑ Basic board documents (by-laws, policies, trustee expectations, strategic plan, etc.),
- ❑ College dashboard indicators,
- ❑ College and board calendars,
- ❑ Communication functions (announcements, email, discussion room, etc.),
- ❑ Committee document sites,
- ❑ Meeting materials, and
- ❑ Archives.

There are additional options and other platforms, and you don't have to do it yourself anymore, as we did. For example, as a trustee at Capital University, I use a system built on SharePoint, which also includes a survey function, workspaces, and pictorial libraries. And there are now several commercial vendors who will set this up for your board (see, for example, www.boardbooks.com). From these sites, virtually all board functions can be conducted, during or between meetings, and all board activities are driven through the site.

Initially, we used the web site primarily for meeting materials, and regular board meetings still lie at the heart of our communication system. Materials are posted continuously in the weeks preceding each board meeting, and members are notified when new items appear. The documents are organized in sets corresponding to the organization of the board meeting, just as a board book would be, so that members can navigate to pertinent documents quickly and easily. Until recently, we still supplied paper copies of key documents on site for late adopters, but as the system has caught on, we now only need to print very late-breaking documents.

As our system has evolved, we learned to capitalize on its possibilities between board meetings. We provide updates to committees on works in progress, we seek approval of changes in plans or new developments on matters that require board or committee action, we post new documents that follow up on board conversations or requests, and we consult with committees or board leaders on breaking issues. We can conduct self assessment and board assessment surveys, review the president's performance, and conduct virtual committee conferences via the web site. Timely and full communication in both directions between board and staff has increased substantially.

One possibility taking longer to exploit is the discussion function for trustee deliberation. Some board members tried it out initially, but it remains an underutilized resource. Members who have issues to raise usually do so directly with other individuals. Because much of the material about substantive board issues is generated through the senior staff, the flow of collective communication naturally focuses on exchanges between board and staff. Intra-board conversation using the discussion function needs to be prompted with a specific question that opens up an issue without seeking a conclusion, at least until boards develop the habit of initiating their own conversation between meetings.

The Internet Advantage

The operational advantages of web-based board communication are considerable, and they fall into two main categories: a) savings and b) process improvements. Primary savings include:

- Staff time once devoted to the production and distribution of the board book can be redirected more productively.
- The costs of duplication and mailing are eliminated.
- No paper is used, enhancing sustainability initiatives.

The major process improvements are as follows:

- ❑ The board is connected to board work at all times and from any place, so the board can function continuously.
- ❑ All board members have a common, readily accessible database of materials and documents.
- ❑ Decisions are made according to the readiness of the issue, not the fixed schedule of board meetings.

These operational advantages would justify the move to internet communication by themselves. But even more significant benefits can be realized from a web-based board operation, those that enhance the capacity of the board to govern. Properly deployed, an internet communication system can support a different way of doing board business. Here are five ways in which internet communication can nourish higher order governance capacities.

- ❑ **Deeper Engagement** – An ongoing flow of communications with the board engages them more often with college issues. Boards that are more engaged on a day-to-day basis can contribute much more to effective governance of the institution, not by micro managing but by supplying their expert counsel.
- ❑ **Responsiveness to Changing Circumstances** – With internet communication systems, boards now have the capacity to respond to changing circumstances as they develop, seizing opportunities in timely fashion or changing directions promptly.
- ❑ **Integrative Partnership with the President** – AGB (*The Leadership Imperative*) has called for “integral” leadership, in which the board and president forge a partnership on behalf of common institutional goals. Ongoing board communication via board web sites supports such a partnership.
- ❑ **Intraboard Dialogue** – Board members often talk to each other only at meetings, unless there is a major crisis. Internet communication creates the capacity to conduct ongoing conversations about major issues without a crisis or a board meeting, which establishes a much stronger foundation for decision-making than once and done reviews of policy issues.
- ❑ **Generative Thinking** – Working with limited time and limited dialogue, most boards stick to managing their fiduciary responsibilities. Some boards are able to govern more strategically. Rare is a board that has mastered “generative thinking” (Chait, Ryan and Taylor, *Governance as Leadership*), about the meaning and significance of things. Open-ended internet communication enables trustees to explore meaning and basic assumptions more easily in support of this important governance function.

Principles for Effective Web-Based Communication

My trustee was right about the benefits of electronic communication but wrong about how easy it would be. Even after five years, we are still not completely satisfied with our system. The process of implementation takes some time to build effectiveness and integrate this new tool with the board's work. There are several obvious obstacles to effectiveness: 1) some members don't have the appropriate technology; 2) members feel secure with the books and insecure with the web; 3) they forget, and we have to generate paper anyway; 4) members feel its too much work to learn a new system; and 5) they just print it themselves instead of saving paper. There are more, but those are some of the major ones.

Those headaches are real and can create frustrations in the transition to web-based communication, but their eventual resolution is mostly a matter of persistence and patience. I have not seen dramatic resistance to such change, and once the board decides to go this direction, the transition is usually readily accomplished as members become comfortable with new ways. The larger challenges arise from dilemmas that need thoughtful solutions for the board in question. We have found five main areas where good decisions, not just patience, are critical in making web-based communication effective: culture, architecture, coherence, coaching, and dialogue. For each, I offer a few comments framed around a central principle of effectiveness.

- ❑ The culture of the board always trumps concepts of the perfect system. It does not matter how elegant the conception of your system is; it only works if it fits with board culture. Consistent with our religious heritage (Church of the Brethren), Elizabethtown's board has a "culture of simplicity." A complex system will not work for us, even though it looks brilliant in design. Our board does not want immense amounts of information, so we have to give them only what is necessary and manageable for the work at hand. Other boards, like Capital's, expect to see more complexities, so Elizabethtown's system would frustrate them even though it works for us.
- ❑ The architecture of board work is more important than the architecture of the technology. It is comforting to suppose that the right software will ensure effectiveness, but the real key, whatever the software, is to design a system to fit the way your board works. For example, we changed the structure of our website when our board altered the structure of its meeting agenda so that the design matched our new pattern of work. Even if an outside vendor is engaged, it is critical that the institution itself design the site for maximum effectiveness, even if some of the features offered by the platform are not heavily used.
- ❑ Coherence is necessary to make convenience real. Just because board members can get speedy results does not make the system convenient for them. Securing fast access to the wrong documents or having to hunt for documents that are out

of order just frustrates board members and makes the system less convenient for them. Likewise, a haphazard posting of documents over time, which is quite convenient for the senior leadership team, is not convenient for board members because there is no consistent rhythm and timetable for using the web site. There has to be an orderly pattern to the arrangement of the documents that is effectively linked to the pattern of their use for board members to experience a real convenience.

- ❑ Coaching is vital to initial success and essential to sustained success. Even the first clause in this proposition is not always self-evident, as we discovered the hard way. Figuring that people would have little trouble, we just gave them passwords and invited them in. After dozens of calls about how to access the site and use it, we quickly created a coaching system to help people utilize the system most effectively. Then we discovered that board members often forget what they once knew after weeks between uses. We also learned that it is necessary to prompt members when it is time to review documents so that they can do so in synch with document postings. And coaching is especially necessary to capitalize on unfamiliar functions, like discussion boards. In short, coaching must be continuous.
- ❑ Dialogue is more powerful for good governance than delivery. The operational benefits of board internet communication are realized primarily by delivering material and messages in a new way. However useful, though, shifting to a new mode of delivery will not improve board governance itself. The power of internet communication to extend board effectiveness arises from its capacity to host board dialogue. For boards that are not used to the dialogue and debate inherent in higher board functions, this medium provides a way to open up discussion. For boards that are already functioning at higher levels, this new capacity can multiply their effectiveness. But the dialogue function must be intentionally nurtured; even good boards will not automatically exploit it without prompting.

Old habits don't die easily, and moving a board to full web-based communication always takes some time. But the time it takes to do so is a worthwhile investment for the board and the institution itself. It remains only a tool, but it is a tool that can change the conditions of board work in such a way that the boards will not only become more efficient, but also more effective.

About the Author



Theodore E. Long
President, Elizabethtown College

Theodore E. Long became the 13th president of Elizabethtown College in 1996. Previously he served as provost and vice president for academic affairs at Merrimack College in North Andover, Massachusetts, and earlier he taught sociology at George Washington University, Hollins University and Washington and Jefferson College. A 1965 graduate of Capital University, President Long earned a master's degree in sociology from Duke University (1968) and a Ph.D. in sociology from the University of Virginia (1979).

During his tenure, Elizabethtown has grown significantly in size, academic stature and financial strength as it implemented a comprehensive strategic plan and master facilities plan. The college has built distinctive programs of study around four signature emphases: global education, purposeful life work, experiential education, and relationship-centered learning, which will highlight its strong position among comprehensive liberal arts colleges across the country.

As a scholar, President Long has studied and written on religious movements, religion and politics, religion and the economy, religious conversion, social change, socialization, and the training of physicians. He served as president of the Association for the Sociology of Religion in 1990-91, and has been active in many other scholarly and higher education associations. He is a trustee of Capital University, his alma mater, the largest Lutheran university in the country, has conducted numerous accrediting reviews as a visiting team leader, and is frequently engaged by colleges and other non-profits to lead strategic planning and board development processes.