

# iPads in the Board Room: Efficiency-Booster or Time-Waster?

## What impact is the “electronic board book” trend having on board engagement and leadership?

By Dottie Schindlinger

**T**hese days, board rooms are filled with directors staring at small screens. In my job I spend most of my time interacting with nonprofit board members and the staff who support them.

In the past six months, I've seen an explosion of electronic gadgets in every board room I enter. By far the most popular choice is the Apple iPad, which is quickly becoming the “must have” device for board members. The iPad provides board members the ability to download board meeting packets and annotate them right on the iPad screen – no paper or pen required.

When I decided to write this article, my firm conducted a quick poll of our clients to find out what devices their board members are using to download and review board or committee meeting packets. From over 350 respondents in healthcare, higher education, associations, private foundations, aging services, human services, government, and other nonprofits, over half turn to their iPads.

### AND THE WINNER IS...

...**iPad**, with 52% of surveyed board members using the device to navigate board meetings.

Those not using iPads reported turning to the following to review and/or download their board materials:

- **laptops**, 28%
- **desktops**, 18%
- **other**, including other tablet computers and smartphones, 2%

There's no question that the iPad trend is causing great excitement among board members and the staff who support them. It's clear that moving to an electronic board book and carrying a thin, lightweight device is far easier – and greener – than lugging around three-ring binders stuffed with paper. We're seeing many organizations save big bucks on staff time, paper, printing, and mailing costs by moving to an electronic board packet delivered via iPad.

What isn't as clear yet is the impact this trend is having on director engagement in the board room. I'm beginning to hear questions about whether using devices such as iPads can become a distraction. In this article, I want to share with you some of the latest research as well as my own impressions from working with hundreds of boards – all trying to determine the best next steps.

First, a little background. The use of iPads in the board room coincides with the emerging trend of e-governance – the strategic use of Web-based board portals to enhance governance. Board portals are designed to streamline the creation and delivery of board information securely over the Internet.

“ Can devices such as iPads become a distraction? ”

### BOARD PORTALS BECOME THE NORM

The latest estimates:

- **One out of every two boards** uses a portal.
- **Another 20% plan to implement a board portal** within six to twelve months.
- **Fully 18% use tablet computers (typically, iPads)** with another 20% planning to roll out tablets within a year.

— survey conducted by KPMG, Audit Committee Institute

With the use of board portals having reached critical mass, many organizations are seeking the best delivery vehicle for the electronic meeting package. The iPad has emerged as the clear winner, with every major board portal vendor – including BoardEffect, Directors Desk, BoardVantage, and Diligent BoardBooks – releasing iPad apps to streamline board book delivery to the device.

This past summer, my good friend and colleague Steven Bowman, Director of the Australian-based firm ConsciousGovernance, conducted a survey of nonprofit CEOs and directors to determine where they stand on the e-governance curve and, in particular, what they think about using iPads in the board room. His survey revealed that 90% of respondents were already either in the process of implementing iPads in their board rooms or were thinking about doing so in the near future.

Over a third reported that directors were already bringing their own iPads with them to meetings – whether or not the organization was ready to move in that direction. He found nonprofit staff and board members are using iPads to deliver meeting packets; mark up documents and write notes in preparation for meetings; run slide presentations during meetings; take notes at meetings; and record, edit, and send meeting minutes.

Organizations that analyzed the return on investment found that purchasing iPads paid for itself within four to six months of usage based on the cost savings resulting from less use of paper, printing, postage, and staff time.

### iPads and Director Engagement: Some Observations

Still, the survey didn't touch on iPads' impact on director engagement. Because this trend is so new and growing so rapidly, determining its impact is like trying to hold water in your hand. Having said that, based on working with hundreds of boards, I'd suggest the following:

#### EMBRACE “iENGAGEMENT”

Board members don't seem to be distracted from the board meeting by their iPads. However, there is definitely less eye contact in board rooms where iPads are used.



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At one client's board meeting, I observed over 50 directors using iPads to participate in the proceedings. I sat near the back of the room where I could conveniently and unobtrusively see what directors were viewing on their iPads. To my surprise, I did not see a single screen that was tuned to anything other than the board meeting packet. It seemed to me that when board members were leaning over to speak with one another, they were offering advice and assistance to colleagues on where to find a particular page or paragraph. Everyone seemed intently focused on the meeting. However, all eyes were indeed glued to their screens, only glancing up occasionally to look at the presenter.

When I provide training to board members on how to use the iPad to review meeting packets, as I do dozens of times each year, I find myself looking around a room of faces with eyes glued to iPad screens. Yet, just when I fear I might have lost their attention, I'll pose a question to the group and every member is quick to respond. They are clearly following along. Eye contact and engagement aren't synonymous, and we shouldn't assume directors aren't paying attention just because they aren't looking up from their screens.

#### SET CLEAR "iGOALS"

While iPads can create efficiency in the governance process, boards shouldn't start using them without setting clear goals. My firm now works with over 33,000 board members, all of whom are moving to electronic board books. The single most important lesson we've learned from this work is that clear goals should be established before any transition begins.

Many well-intentioned people have attempted to introduce e-governance to their boards only to meet with incredible resistance. But this can be avoided: Simply have a conversation with the board about the greatest pain points in the governance workflow process. Then use their answers to establish shared goals for e-governance.

For example, the time and expense involved in preparing and delivering board meeting packets is the most common pain point we hear. By discussing pain points openly, groups can establish parameters for potential solutions, such as iPads, and create buy-in for making changes.

#### OFFER iTRAINING

iPad training should be offered to everyone, and policies should be established for how iPads should be used in meetings. Some training sessions might last 30 to 45 minutes, others might involve only a

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five-minute phone call with the board member's assistant, but the result is that each member receives the same basic information along with any additional coaching needed.

I recently had a fascinating experience. One of our clients decided to provide one-to-one training sessions for each trustee on using our iPad app and board portal solution. During the training sessions, we were not only showing trustees how to use the app, but also showcasing the kinds of information available to trustees through the portal. One trustee turned out to be a famous technology inventor. Needless to say, hands-on training on an iPad app was unnecessary for this trustee. Instead, we had a quick conversation with his assistant, provided some simple instructions, and he was good to go. The point is this: Offering training to every trustee ensures everyone hears the same message, including any policies around how board members should use iPads in meetings.

Overall, I believe the iPad, along with the e-governance movement fueling its popularity, has great potential to increase efficiency and build board engagement. However, it will be up to each organization to set clear policies and group norms around how the gadget gets used. Ultimately those policies and norms will determine whether the iPad is a time-saver or time-waster in your board room. 

*As vice-president of e-governance for BoardEffect, Dottie Schindlinger (dschindlinger@boardeffect.com) promotes e-governance as an expert in the field. This article is reprinted from YOU and Your Nonprofit Board: Advice & Practical Tips from the Field's Top Practitioners, Researchers, & Provocateurs, courtesy of CharityChannel Press, available at CharityChannel.com, Amazon.com, and barnesandnoble.com.*

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**Using Board Portals to Keep Directors Connected** (Vol. 18, No. 3)

**Powerful New Communication Tools for Your Meetings: Engaging Both Sides of the Brain** (Vol. 26, No. 3)

**Training Programs Need More than Good Information** (Vol. 21, No. 2)

**Beyond the Board Package** (Vol. 27, No. 5)

**It's Not Over till It's Over: Five Strategies to Improve Your Meetings** (Vol. 30, No. 1)

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