

Leading Boards Build Strong Relationships

Use this tool to create strong and authentic relationships.



This tool is part of the Inclusive Boards Playbooks. In collaboration with directors, national organizations, and leading thinkers, we have compiled these practices and tools to assess your board's practices and activities to create a leading board culture. For the complete playbook, go to inclusiveboards.stanford.edu.

INSTRUCTIONS

- Identify opportunities for growth and areas of strength for your board using the table on page 1.
- For further details and actionable items, refer to pages 2-4 for additional director-sourced and research-backed strategies and tips.

Strong and authentic relationships can help board members work together more effectively. As board meetings take place only a handful of times a year, and committee meetings do not include all members, boards can create other opportunities to build trust and mutual respect amongst peers. Use this evaluation tool to identify opportunities to strengthen relationships between members of the board.

Self-Evaluation: Board Relationships

Check which areas you have provided opportunities for board directors to deepen their connections.

Does your board:	Never			Always	To learn more, go to strategy:
In meetings and retreats, plan connection exercises that encourage directors to get to know each other on a deeper level.	1	2	3	4 5	<u>1</u>
Vary the approach to board get-togethers , including modes and locations, or consider other ways to build strong relationships.	1	2	3	4 5	<u>2</u>
Participate in learning and development together by engaging a field expert or participating in company training.	1	2	3	4 5	<u>3</u>
Build opportunities to meet employees and plan visits, including at sales conferences, manufacturing facilities, or with customers, etc.	1	2	3	4 5	<u>4</u>

Key: 1 = Never, 2 = Rarely, 3 = Sometimes, 4 = Very Often, 5 = Always

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Strategies for Building Strong Relationships

These ideas are gathered from board members who practice and recognize the value of strong interpersonal connections.

1 Use connection exercises

Encourage members to get to know each other more fully to help minimize emergent protective mechanisms.

Create prompts for members to ask focused questions to each other.

Sample exercise:

- Create a grid with prompts in each square (see example below).
- Give members time at the beginning of a board retreat or off-site to go around with a card and collect answers for a few squares by different board members, along with a personal story.
- Consider repeating this exercise after board refreshment cycles.

Example Retreat Exercise			
How many siblings do you have (if any)?	How do you start your day?	What was your first job?	In what countries or states have you lived?
How would you describe the neighborhood you grew up in?	If you were a talk show host, who would be your first guest?	What is your morning or evening routine like?	What is your favorite book or TV show? Why?
Who do you provide care for?	What always makes you laugh?	What helps you relieve stress?	What have you learned from a caregiver in your life?
Describe the last time you did or tried something for the very first time. How did it feel?	What is your most prized possession?	What is one of your most satisfying or exciting travel destinations?	What is the one modern convenience you cannot live without?

Suggest that members connect with at least one director between meetings.

2 Plan inclusive board get-togethers and activities

Consider layering in activities for the board to get to know directors with whom they may have spent less time with in the past. Vary the approach for access and inclusion.

- Set aside unscripted time for people to get to know each other better.** Encourage people to connect with someone that they know less well. Consider this instead of a working lunch. Or add an informal gathering before a board dinner begins.
- Audit typical event locations:** Notice if the venue caters to primarily homogenous groups and consider new settings that cater to a range:
 - Group activities: Consider a range of abilities and expertise and if appropriate, include instructors for people who are new to the activity. Consider access for people with disabilities.
 - Restaurants: Consider rotating your selection to include different cuisines.
 - Alcohol: Include alternatives, as people may not participate for a number of reasons, including preferences, religion, pregnancy, and allergies.
 - Families: Consider including introductions to family members during virtual events. If a family member travels with the board member, consider including them in social events.
- Consider making space for subgroups to meet informally around board meetings,** such as women directors, newer board members, etc.
- Invest time and resources into board retreats.** If possible, the chair and key management should work collaboratively with an external planner to design a retreat that is different in format and tone from usual board meetings.
 - Tip: Schedule the board retreat after your annual board evaluation process to review action plans for board development and improvement as a group. If possible, coincide the timing of retreats after any changes in board membership as well (onboarding or offboarding).

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3 Engage in learning to foster collaboration, especially across differences

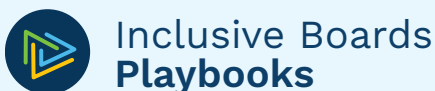
When engaging in board training, be inclusive in how you form groups, engage in discussions, do read outs, etc. In addition, periodically schedule belonging and inclusion workshops to get to know oneself and each other better. This will help to minimize protective mechanisms which might emerge for board members from a historically marginalized group.

- Put inclusive practices into all training sessions.** For example, when hosting a learning session, try assigned seating, putting together combinations of people who do not always work together in committees. Rotate how people share out, so you hear from different people first or last.
- Hire a facilitator to conduct personality assessments** like Myers-Briggs, DiSC, Enneagram, FourSight or other managerial tools to uncover work style commonalities and differences, and to foster more effective communications.
- Engage in training and self-learning on diversity, equity, and inclusion (DEI) topics.** If appropriate, participate in company DEI training or activities.

4 Connect with the company

Create opportunities to connect beyond board meetings. After the engagement, plan a debrief, highlighting and valuing the different observations and insights gained.

- Visit the company's manufacturing facility, regional office, design studio or other unique site.** For example, add a trip to a historical site where you can learn about the context of the company's history.
- Plan a board activity that involves touch-points with customers,** such as attending a customer, partner, or reseller meeting.



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Strategies in the Inclusive Board Playbook are:

- > Establish Inclusive Norms
- > Facilitate Effective Meetings
- > Build Strong Relationships
- > Mentor New Directors
- > Engage With and Value Differences