**Survey Email Templates**

Communicating with your board members about the survey is critical to ensuring your organization has high participation rates. Customize the below email templates to send to your board members before, during and after the survey.

[**Before the Survey**](#_kb69a7x1u8r8)

* [Note to All Board Members](#_1jkmscrdyva): *Send this to your board members no later than August 29 before the survey launches. We recommend that the Survey Liaison Staff Lead send it with the listed leaders below cc’d.*
* [Note to new Board Members:](#_ys982luqohn9) *Send this to new board members following your email to the full board prior to survey launch. We recommend that the Survey Liaison Staff Lead send it with the listed leaders below cc’d.*
* [Day before the Survey](#_9tlxxprh6syg): *The Survey Liaison Staff Lead should send this to your board members the day before the survey launches.*

[**During the Survey**](#_fq55r914pnkp): Note - Automatic individual reminders will be sent by the Culture Amp survey platform to any board members who have not submitted their survey each Monday after the survey launches and a final reminder will be sent on the last day the survey is open. These templates are for you to send to all board members in between those reminders.

* [First Reminder](#_dsez4dyp60yc): *The Survey Liaison Staff Lead should send this to your board members on or around September 19, 3-4 days after the survey launches.*
* [Second Reminder](#_sdekcql6j415): *The Survey Liaison Staff Lead should send this to your board members on or around September 26, 3-4 business days before the survey closes.*

[**After the Survey**](#_gkr0hvpf2rux)

* [Thanking Board Members](#_d0percb26970): *Send this to your board members 2-3 business days after the survey closes. We recommend that the Survey Liaison Staff Lead send it with the listed leaders below cc’d.*
* [Sharing Results](#_v8ilj8wv5yeo): *It is strongly recommended that a high level data report be shared with the full board at your final meeting of the year in 2024. Then, a more robust data review and action planning conversation should be conducted in January or February 2025. Send a version of this email to your board as a follow up after each presentation. We recommend that the Board Chair and CEO send it with the listed leaders below cc’d.*

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### **Before the Survey**

##### **Note to All Board Members**

*Send this to your board members no later than August 29 before the survey launches. We recommend that the Survey Liaison Staff Lead send it with the listed leaders below cc’d.*

Dear Board Members,

As we hope you know, our board will be participating in L[eading Edge’s Pilot Board Experience Survey](https://www.leadingedge.org/program/board-experience-survey) this fall. We were invited as part of a select group of JCCs for our benefit, and to give us an opportunity to provide Leading Edge with valuable insights about the pilot that can help inform scaling this offering in the future.

[Leading Edge](https://www.leadingedge.org/) helps Jewish nonprofits improve their workplace culture and leadership so that they can better achieve their missions. The Board Experience Survey leverages one of their core and tested methodologies — a survey tool that provides us with data insights, and consultation support to take action on the learnings that emerge.

Research shows that regular board assessment, no less than every two years, can be a critical lever to improve board effectiveness, board member experience, and the future growth of the board. We look forward to taking advantage of this opportunity to be in alignment with this best practice.

Note that participation in this survey is 100% confidential. Nobody outside of our organization will see our data, and our organization’s leaders will not have access to individual responses or know who has completed the survey. Leading Edge and our survey platform, Culture Amp, will protect this information through a set of safeguards and security protocols. You can read more about Leading Edge’s commitment to confidentiality on the Board Experience Survey [website](https://www.leadingedge.org/program/board-experience-survey).

Key Dates:

* **September 16 - October 2: Survey Administration** - You will receive a unique link from the survey platform Culture Amp. Automatic reminders to complete will be sent throughout the survey window. Note that we need at least 75% completion in order to receive results, and we would love to see 100%!
* **October 28: Results Access** - Designated leaders from our organization including our CEO, board chair, and select others, will receive access to our results via the Culture Amp platform.
* **October 28, 2024 - February 28, 2025: Consultation Window** - Our organization receives five hours of pro bono support from a consultant with board governance expertise, as well as an additional hour to help us prepare to share back the findings with the full board. Our CEO, Board Chair, and select board members will participate in these conversations to understand our results, develop an action plan, and prepare to share back findings to the full board.

Please be in touch with [Survey Liaison Lead] with any questions about the pilot and thank you in advance for your participation!

Best,

[CEO, Board Chair, and Survey Liaison Team Signature]

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##### **Note to New Board Members**

##### *Send this to new board members following your email to the full board prior to survey launch. We recommend that the Survey Liaison Staff Lead send it with the listed leaders below cc’d.*

Hello [New Board Member First Names],

As you know, our board will be participating in the pilot [Leading Edge Board Experience Survey](https://www.leadingedge.org/program/board-experience-survey) to gain insight on how we can become an even better place to serve. Your perspectives as new board members is particularly important as we work to establish strong board culture and effective board governance. Although your official tenure on the board has been brief, your relationship with [Organization Name] is much more substantial, and we hope you consider the totality of your perspective when you take the survey.

A few reminders about the survey design to keep in mind:

* **All questions and comments are optional.** If there is a question you don’t feel you have enough insight to answer you can skip it, and if there is perspective you want to add to your rating, you can explain in the comments. Note that all comments will be visible verbatim as part of the results. Please refrain from putting any identifying information in the comments to protect your confidentiality.
* **All answers and comments are 100% confidential.** Leading Edge and their survey platform Culture Amp keep all individual responses confidential through a series of safeguards and security protocols. At no point will anyone from our organization have access to individual survey responses, and our organizational leaders will only receive data in the aggregate.
* **A confidentiality threshold of 4 individuals per demographic group ensures that no individual responses can be identified.** Choose based on relevance:
  + Since we have [4 or more / actual number] new board members, we will be able to see aggregate responses based on tenure in a way that will help us understand our strengths and gap areas in onboarding and governing without compromising individual confidentiality.
  + Since we have [less than 4 / actual number] new board members, we won’t be able to see responses based on tenure and your individual confidentiality will not be compromised.

We hope all of you will participate in the survey and help us reach 100%. Please let me know If you have questions about the survey process. I appreciate your commitment to helping [organization name] become an even better place to serve!

Warmly,

[CEO, Board Chair, and Survey Liaison Team Signature]

##### **Day Before the Survey**

*The Survey Liaison Staff Lead should send this to your board members the day before the survey launches.*

Dear Board,

Tomorrow officially opens our Board Experience Survey, we are excited to participate in this Leading Edge pilot! Your honest responses and comments will help us understand what we do well and areas we need to improve to make our board an even better place to serve.

The survey will be administered at some point tomorrow via email from “Leading Edge via Culture Amp” at <[notifications@cultureamp.com](mailto:notifications@cultureamp.com)>. We will each receive a personalized link to respond to the survey. Please do not forward or share your survey link with anyone else.

If you **do not** receive the email in your inbox **by the end of day tomorrow**, please:

1. Refrain from asking a fellow board member to forward their survey email, as the links are unique and cannot be shared.
2. Search for the email in your All Mail, Junk and Spam folders.
3. Let me know if your email is not there and we will request that you be sent a new email with a link to access the survey.

Reminders about the survey:

* It will take approximately 20 minutes to complete and can be completed in multiple sessions
* All questions and comments are optional

**We value your honesty and guarantee that all of your responses and comments are 100% confidential. At NO POINT will we have access to individual responses or know who completed the survey.**

Thank you for lending your voice to our learning process. Your feedback will help us become an even better place to serve!

Warmly,

[Survey Liaison Lead Signature]

### **During the Survey**

##### **First Reminder**

*Note - Automatic individual reminders will be sent by the Culture Amp survey platform to any board members who have not submitted their survey each Monday after the survey launches and a final reminder will be sent on the last day the survey is open. This template is for you to send to all board members in between those reminders.*

*The Survey Liaison Staff Lead should send this to your board members on or around September 19, 3-4 days after the survey launches.*

Dear Board,

As you all know, we are participating in a Leading Edge Board Experience Survey. This valuable tool was created to help organizations like ours become an even better place to serve. With your honest feedback, we can learn from many perspectives to build upon our strengths and identify growth opportunities.

**Right now, X% of our board have completed the survey.** If you have not submitted your survey, please take some time to tell us your thoughts. We recognize that all of you are pulled in many different directions for your time, but hearing everyone’s voice and gathering as much data as possible is invaluable for the growth of our board and our organization.

**Please know that all of your responses and comments are 100% confidential, and at NO POINT will we have access to individual responses or know who completed the survey.**

If you no longer have or cannot find your personalized survey link sent from <[notifications@cultureamp.com](mailto:notifications@cultureamp.com)>, please let me know and we will send you a link to access the survey.

Warmly,

[Survey Liaison Lead Signature]

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##### **Second Reminder**

*Note - Automatic individual reminders will be sent by the Culture Amp survey platform to any board members who have not submitted their survey each Monday after the survey launches and a final reminder will be sent on the last day the survey is open. This template is for you to send to all board members in between those reminders.*

*The Survey Liaison Staff Lead should send this to your board members on or around September 26, 3-4 business days before the survey closes.*

Dear Board,

We are almost there! **As of today, we have a X% participation rate!** What an incredible show of support!

**We want to hear from everyone and want to remind you that your responses are 100% confidential. Nobody at our organization will ever see your individual responses or know if you took the survey.**

Please note, we require a 75% response rate to receive a report of our board’s data, making your input even more vital.

If you can’t find the survey email in your inbox or All Mail folder, please let me know and we’ll send you a link to access the survey.

Let’s finish strong!

[Survey Liaison Lead Signature]

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### **After the Survey**

##### **Thanking Board Members**

*Send this to your board members 2-3 business days after the survey closes. We recommend that the Survey Liaison Staff Lead send it with the listed leaders below cc’d.*

Dear Board,

Thank you for participating in the Leading Edge Board Experience Survey! Our response rate was [XX%]. Your honest feedback is critical in helping us understand how we can make our board an even better place to serve!

We will receive the survey results in an aggregated form within the next few weeks, and will analyze the data to determine the main themes impacting board experience. As part of our organization’s participation, we have access to consultation support which we will use to understand our results, identify areas for action, and plan for next steps, which will include sharing themes and findings over the next few months.

Thank you for playing a part in our efforts to continually improve the experience serving at [organization name].

If you have any questions, please be in touch.

Many thanks,

[CEO, Board Chair, and Survey Liaison Team Signature]

##### **Sharing Results**

*It is strongly recommended that a high level data report be shared with the full board at your final meeting of the year in 2024. Then, a more robust data review and action planning conversation should be conducted in January or February 2025. Send a version of this email to your board as a follow up after each presentation. We recommend that the Board Chair and CEO send it with the listed leaders below cc’d.*

Dear Board,

Thank you again for taking the time to respond to the Leading Edge Board Experience Survey. We are extremely grateful for the honest and transparent feedback that was shared.

Below is a summary of the major themes that arose from the survey, based on our [XX%] participation rate. Your feedback has helped provide a clear picture of our strengths and growth areas as a board and will allow us to move forward and address some of our gaps with strategic action planning.

Our top [#] strengths were revealed as:

* [Strength 1 - include optional data or statistics to support]
* [Strength 2 - include optional data or statistics to support]
* [Strength 3 - include optional data or statistics to support]

Our top [#] growth areas were revealed as:

* [Growth area 1 - include optional data or statistics to support]
* [Growth area 2 - include optional data or statistics to support]
* [Growth area 3 - include optional data or statistics to support]

We would love your partnership in moving forward to take action. Over the next [timeline], we will [action steps related to further sharing of the findings and next steps around the data itself, including anyone who is leading those efforts]. If you would like to be a part of that process, please let us know.

If you have any questions, please be in touch. We look forward to working with you to build an even better place to serve!

Warmly,

[Board Chair and CEO Signature]