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Visioning

[Book: Field Guide to Nonprofit Strategic Planning and Facilitation](#)

The book is organized so that the reader can use it to conduct a complete strategic planning process, or it can be used as a reference manual to address certain phases of planning when needed.

Board Composition Exercise

Ideal Board

Imagine that you could have any skills you wanted on the board. What would it look like?

For this exercise, start with a blank sheet of paper and write down all the competencies and skills an ideal board for your organization would possess, based on the challenges you see in the next 3-5 years. Do not start with current directors' skills and abilities.

Board Competencies

After completing the Ideal Board exercise, now list out your board competencies. These include:

- Skills and experience
- Individual attributes
- Representational factors

Take Stock

Looking at the Ideal Board and your current board competencies, identify holes and mismatches. These can be addressed either via recruiting or "purchasing". For example, every board needs an accountant from time to time, but it may not be necessary to have an accountant on the board. Accounting services can be retained when the time comes.

Then, use the recruiting resources we've provided to begin to recruit directors with skills that you've identified are missing and cannot be "purchased".

Above information summarized from [Building Better Boards](#) By David Nadler, Beverly Behan, Mark B. Nadler

Clarifying Mission & Vision

[What should our mission statement say?](#)

"A Mission Statement should be a one-sentence, clear, concise statement that says who the agency is (the name, that it is a nonprofit, and what type of agency it is), what it does, for whom and where. Period."

An example: "United Community Center is a 501(c)(3) human service agency providing emergency assistance, daycare, social services and recreational activities for low-income children and families at risk in inner city Atlanta, Georgia".



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[The Vision Statement](#)

“A mission statement lets people know what your organization does; the vision statement, however, has a much loftier goal: showcasing your organization’s view of the future.”

Some examples include:

- The vision of the ASPCA is that the United States is a humane community in which all animals are treated with respect and kindness.
- SHELTER, Inc. is working to realize a vision: A Home For Everyone.
- We will work until we achieve a society free of violence.

[Basics of developing mission, vision and values statements](#)

This article from ManagementHelp.org discusses the differences between the types of statements and what each should include.

Drafting Roles & Responsibilities

[Overview of Roles and Responsibilities of Corporate Board of Directors](#)

Examines major duties and responsibilities of the Board of Directors.

[Sample Job Descriptions for Members of Boards of Directors](#)

This includes some basic job descriptions for roles such as the Board Chair, Vice Chair, Committee Chair and Board Member.

[Sample Board and Staff Responsibilities Breakdown](#)

Gives an examples of tasks including Approve Annual Objectives, Approve Long Range Goals, Prepare Performance Reports, and suggests whether they should be completed by the board, the staff, or jointly.

[Nonprofit Board Governance](#)

A listing of Roles and Responsibilities, Board composition conduct and the relationship between the Board of Directors & the Executive Director.

[Specifying Job & Role Competencies](#)

Information explaining how to clearly articulate job & role competences

Board Self-Assessments

[Organizational Self-Assessment: Putting Your Finger on What Needs to Improve](#)

“Self-assessment is about taking the pulse of your organization—what is currently working well? What isn’t working well? What is hindering your progress? It should be designed to expose root causes of organizational problems or issues, so that appropriate and effective solutions can be implemented. Or it may be used when you want to do something you have never done before—better informing you of the strengths you can apply to the effort and the deficiencies that might inhibit implementation of your new idea.”



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Taking stock of where you board is in terms of organization purpose, structure, work processes, staff leadership and other aspects allows you to identify what is working well and what needs to be worked on, clarifying the path toward the strategic plan.

Why should boards engage in self-assessment?

Board self assessment is an opportunity to clarify expectations, point to questions that need attention and reflect on individual and shared responsibilities.

How often should boards engage in self-assessment?

This article suggests once per year, or every other year.

Board Member Assessments

Developing Management Skills Assessment Site

Link for purchasing the code – \$35.00. Allows you to access the assessments online.

This a useful site which provides self-assessment tests to help identify your individual characteristics. Having insights into your strengths and weaknesses can help the board work better together. There is a large number of tests available, as listed below. The top three are typically the most useful to do at the beginning.

- Personal Assessment of Management Skills
- Self Awareness Test
- Emotional Intelligence Test

Secondary Importance

- Learning Style Assessment
- Locus of Control Assessment
- Tolerance of Ambiguity Scale
- Communicating Supportively
- Communication Styles
- Gaining Power and Influence
- Using Influence Strategies
- Diagnosing poor performance and enhancing motivation
- Managing Interpersonal Conflict
- Strategies for Handling Conflict
- Effective Empowerment and Delegation
- Team Development Behaviors
- Diagnosing the need for Team Building
- Leading Positive Change
- Machiavellianism Scale – MACH IV