

Board Transformation Toolkit

OVERVIEW & FACILITATOR'S GUIDE



Center for Nonprofit Excellence



**center for
nonprofit excellence**
COMMUNITY FOUNDATION FOR MONTEREY COUNTY

Build the board you really want!

The Board Transformation Toolkits provide the groundwork for boards to learn new skills, reflect on their strengths and plan steps to become even stronger.

These trainings are for you if:

- you want a **strong, cohesive board** and are ready to get started now;
- you want your board to use effective methods in guiding your organization;
- you have limited funds for board training or consultants.

The Center for Nonprofit Excellence's Board Transformation Toolkits are designed to be used by board members, with board members. One person can begin the process to make a big difference on a board, just by using the toolkits, and making the entire board's work easier and more effective. That will help your nonprofit have greater impact in the community and deliver on the mission you all support.

Learning Topics

Planning for Fund Development Parts I & II

Guide to Roles & Responsibilities

Thriving as Board Chair

Building the Board Manual

New Member Recruitment & Orientation

Steps to Evaluating the Work of the Board

Effective Board Meetings

Evaluating the Executive

Creating Great Committees

Keys to Financial Oversight

Strategic Planning & Pursuit of Mission

Understanding Nonprofit Lifecycles

Establishing Strong Board & Staff Relations

We hope that you will find the toolkits useful and enjoyable, that your board will flourish, and that your organization will grow increasingly effective at achieving your mission. We look forward to hearing your suggestions or questions at kaki@cfmco.org.

Facilitator's Guide

Each Board Transformation Toolkit is designed to offer an overview of the topic and serve as a starting point for further development and learning by your Board. **Read all the steps below before you prepare your presentation. Be sure to set aside an hour or two to prepare.**

Step One PREPARE

Choose a topic that matches the training needs identified by your board. You do not need to have previous experience in the topic to present most of the toolkits.

Allow at least 1-2 hours for your preparation, depending on the topic and your familiarity with the content. This will allow you to gain an understanding of the content and materials, and will help you structure your presentation.

Each Toolkit contains:

- PowerPoint Presentation
- Facilitator's Guide
- FAQ – Frequently Asked Questions
- Handouts
- Assessment
- Action Plan Worksheet

First, read this Facilitator's Guide and review the toolkit elements prior to viewing the PowerPoint slides. The slides are intended to guide the presentation – they do not include all of the information contained in the toolkit.

Next, review the handouts and determine when you will reference various sections of the handouts in your presentation. Make sure you are comfortable with the topic and toolkit prior to making your presentation.

Remember, you don't have to answer every question on the topic. Part of the value of the toolkits is to identify areas for further learning.

Review the links to Resources and Additional Materials or Publications that are provided. Go to Slide Show view on the slide to click the live link to the internet.

Board Transformation Toolkit

Not all the information provided in the toolkit may apply to your organization at this time but it may be helpful for your Board to have copies for future reference.

Plan the presentation. Consider the following:

- Will you project the slides or use them as handouts or both?
- Will you stop for discussion at the points indicated in the slides?
- Which handouts do you want board member to have? Be sure to make copies ahead of time.
- How will you use the Assessment and Action Plan? Taking action on what you learned is how change will happen in your group. If you don't have time at this meeting, the Assessment can be "homework" and your group can develop the plan at your next meeting. See STEP FOUR. for your group

Take the time to do a trial run prior to making the presentation. You may want to print out the slides as a guide, with additional notes and FAQs, during your presentation.

30 minutes prior to the scheduled time, set up the projector to ensure any last minute technical issues can be addressed.

Step Two PRESENT

Introduce the topic to your board. Let them know you have agreed to present the information in the toolkit as a starting place for further learning and development by the board.

The toolkits serve as a starting point for further learning and board development.

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Begin your presentation of the information. Most of the topics have been prepared to take about 25 -30 minutes to present, without significant discussion. **Many groups find the accompanying discussion extremely helpful, so schedule additional time if possible.**

Pause after major points and ask the group if there are any questions or comments. Engage your audience in a discussion about how the accompanying toolkit materials (handbooks, assessments, sample forms and checklists) might work for your organization. They might suggest adaptations to best meet your needs.

Step Three ASSESS

Each toolkit has an Assessment document. Ask each board member to complete the Assessment tool.

Select someone on the board to take the responses and prepare a summary to present to the board at the next board meeting.

Step Four PRESENT ASSESSMENT RESULTS

After the assessments have been summarized, present the results to the full board.

Facilitate a discussion to identify areas of strengths and areas of needed improvement.

Identify priorities for improvement.

Step Five CREATE AN ACTION PLAN

Use the Action Plan template to determine next steps.

The Action Plan may be developed by the full board, or be delegated to an existing committee or newly formed subcommittee.

Be sure to name clear action items, responsible party or parties, and realistic timelines.

Step Six REFLECT ON PROGRESS

Present the completed Action Plan to the Board.

Report the progress to the board throughout the year. Celebrate success!

Step Seven OFFER *FEEDBACK

Following your presentation and discussion make note of areas or concepts that your group found unclear or that prompted questions.

Your board's feedback will contribute to the ongoing improvement of the toolkits. Thank you.

Take a moment to share your suggestions and feedback with the Center for Nonprofit Excellence staff using our [*online form](#).

The Board Transformation Toolkits were developed by the Community Foundation for Monterey County and are intended to be used by and with the volunteer boards of nonprofit organizations. You are free to copy, distribute, transmit, and adapt the materials as long as you credit the Community Foundation for Monterey County and do not use the Toolkits for commercial purposes.

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