

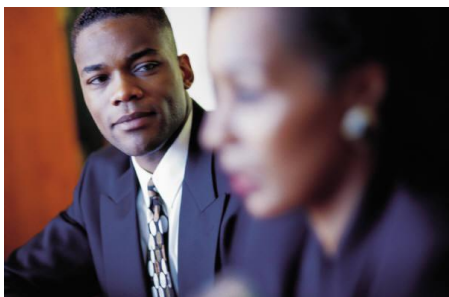
Summary: **Board Roles to Board Goals**

A Self-Paced Board Toolkit for Creating an Annual Board Work Plan

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This self-paced toolkit empowers nonprofit boards to set realistic board goals, inspired by board governance roles, and to create annual board work plans to achieve those goals



Using a step by step process, your designated facilitator will lead your board through a process that mobilizes board talent, gets board members working together on shared goals, and focuses the board on governing.

Overview

What are the most common complaints you hear from board members and executive directors about nonprofit boards? Too often, people complain that their boards are not focused on the right things (namely governance), and that they are not as productive as they could be. Many board members are dissatisfied because they feel their boards don't have clear goals, aren't making progress, and don't effectively use their precious time and talents.

Welcome to **Board Roles to Board Goals**, a toolkit and a process to help focus your board. This step-by-step self-paced guide helps nonprofit boards of directors work together to clarify their goals for the coming 12 months and create an annual **Board Work Plan**.

The process outlined in this guide is an easy way to get to consensus on your most important governance roles, to set goals to fulfill those roles, and to create committees and work plans to achieve those goals.

If your board is not focused on the right things, such as governance, it is probably focused on the wrong things, such as management and operations. What's more, the right things probably aren't getting done. How do we make this very important shift?

Consider two ideas: board roles and board goals. They are linked; the former drives the latter. Clear roles and clear goals allow for an aligned board committee structure and an annual work plan of board goals that both focuses and ensures board success.

How The Toolkit Helps You

This toolkit gives you the means for having a straightforward conversation almost all board members need, and want, to have with each other about what they want to accomplish and how they will get it done.

It is designed to be self-paced and self-directed, so you save money on consultants and build your own capacity as a board.

It improves your focus, making sure you're doing the right things. You may discover, for example, that you want to create some new board committees and retire some that aren't serving your goals any longer.

It builds your board as a team. Because you do this work together, you learn from each other and develop new ways of building consensus. You learn, interact, find common ground, and get to know and respect each other more.

It makes change easy, because it takes you through the change process step-by-step. Each step builds on the one before it, and each one is designed to be achievable. You *can* do this!

It leads to action. You will stop talking about what's not working and move quickly to a plan that will re-energize your board and deepen your commitments to each other.

It leads to greater satisfaction as over time, you set and achieve measurable goals that make your board more effective.

Big Picture: What You Will Accomplish—and How



This process leads you to a final product that will make you proud:

- **Prewrite.** By reading background material and reflecting on a key question, you prepare for your Board Workshop (get the date, time, and location from your Board Chair.)
- **Board Facilitated Workshop.** At the workshop, your board identifies its key roles, self-assesses its performance in those roles, and converts the assessment into preliminary goals. The Board Chair facilitates this workshop or designates this task to another board member or skilled facilitator.
- **Committee Meetings.** Committee chairs convene committee meetings (ideally within one month of the Board Workshop). At these meetings, committees review their assigned role, complete a self-assessment and commit to the annual goals their committee can achieve.
- **Board Meeting.** At a regular board meeting (ideally your next meeting), the board reviews and approves all committee goals. After the meeting, the Board Chair assembles all committee goals into a **Board Work Plan** that details your realistic goals, which are in direct alignment with your governance priorities.