

Template of Training Requirements For Elected Board Members of Membership Bodies

Please customize this template to suit your specific situation.

Essential (E)
or
Optional (O)?

Delivery:

- Internal (I) or
- External (E) trainer or facilitator?

1. General Orientation & Training

1.1 About the Association

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|---|--|--|
| ▪ Mission, Vision, Culture & Values | | |
| ▪ Strategy - The strategic plan | | |
| ▪ Planning - The strategic planning process | | |
| ▪ Objectives & Goals - short, medium and long term; the priorities. | | |
| ▪ Budget and Finance | | |
| ▪ Organizational structure - departments, committees and sub-committees, branches | | |
| ▪ Positioning in the sector v. other associations | | |
| ▪ Community & Members - Categories, penetration of & characteristics e.g. demographics, relationships with external influencers | | |
| ▪ Future trends affecting the sector & industry | | |
| ▪ Equality, diversity and generational synergy | | |
| ▪ Other: | | |

1.2 Roles, responsibilities & accountability of nonprofit boards

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|---|--|--|
| ▪ Elected board members do not get involved in the associations day-to-day affairs | | |
| ▪ Governance | | |
| ▪ Legal responsibilities, board member liability and other legislation, regulations and by-laws | | |
| ▪ Policy development | | |
| ▪ Other: | | |

1.3 Committee information^{*1}

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|---|--|--|
| ▪ Term of office & title | | |
| ▪ Meeting frequency and attendance expectations | | |
| ▪ Minutes and agendas | | |
| ▪ Time commitments | | |
| ▪ Rules of conduct | | |
| ▪ Relationship with paid staff and other board members - roles and who does what when | | |
| ▪ Task descriptions - specific duties and responsibilities of roles e.g. secretary | | |
| ▪ Board duties | | |

▪ Payments and expenses		
▪ Benefits of being a committee member		
▪ Key staff contacts		
▪ Contacting the association		
▪ Information flow to board members		
▪ Preparing for board meetings		
▪ Resources available		
▪ Skill sets, experience and qualities required and training opportunities		
▪ Performance review		
▪ Internal controls		
▪ Dress code		
▪ Boundary exercises		
▪ Removal of board members		
▪ Other		
1.4 Other roles and assignments e.g. Honorary Officers, Special Roles and other volunteers		
1.5 Organizational polices and procedures - general & specific		
1.6 Resources available e.g. web site orientation, key documents, library researchers, etc		
2. Specific Skill Set Training		
▪ How boards add value including case studies of effective boards and warning signs of problems ahead		
▪ Preparing for meetings and being a good meeting participant.		
▪ Chairing meetings		
▪ Presentation skills		
▪ Report writing		
▪ Time management - including dealing with interruptions		
▪ Giving and receiving feedback		
▪ Negotiation skills		
▪ Strategic planning		
▪ Priority management		
▪ Managing change		
▪ Listening skills		
▪ Project management		
▪ Team building		
▪ Change management		
▪ Rivalry in the boardroom including handling disagreements & infighting, competing agendas - conflicts of interest and dealing with difficult trustees		
▪ Problem solving		
▪ Decision making		
▪ Financial management - reading accounts, budgeting, fund raising, financial reporting & accountability		
▪ Delegation skills		
▪ Risk management		
▪ Leadership skills		
▪ Resource management		

▪ Evaluating board performance and self assessment - overall and individual members		
▪ Establishing process and systems		
▪ Influencing without authority		
▪ Accepting responsibility		
▪ Articulating goals		
▪ Working with partners and alliances		
▪ Other		
3. For the Leaders		
▪ Building relationships between President, CEO & Chair		
▪ Succession planning		
▪ Governance		
▪ Recruitment and selection of board members		
▪ Core competences of board members		
▪ Designing an effective board member induction program		
▪ Board size and composition		
▪ Performance evaluation		
▪ Other		
4. Other Training		
NB: This is likely to depend on your mission & constitution priorities e.g. influence v. lobby.		
▪ Media relations and promoting the association		
▪ Advocacy, lobbying skills & parliamentary procedure		
▪ Industry resources		
▪ Working with specific technology		
▪ Other		
5. Other - training needs specific to your organisation		

Notes

- ¹ Section 1.3 on 'committee information' is likely to be a separate course for different groups e.g. regional committees, branches committees and standing committees, etc. It would also be useful to support the training with a handbook.
- You may also want to run separate sessions depending on their level of experience. For example, consider the needs of emerging leaders (new/incoming president) v. developing leaders v. advanced leaders.
- In your planning you may want to consider undertaking a Training Needs Analysis (TNA) beforehand to uncover specific skill gaps for each board member.
- This document is available in pdf and MS Word format. For additional copies go to www.suefroggatt.com/electedboardmembertraining.html.
- Can this template be improved? Please forward your suggestions to sue at sue@suefroggatt.com.
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