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		
▪ 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		
▪ 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]		
▪ 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 & dealing with change		
▪	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		

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▪ 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		
▪ E-communication & social media skills		
▪ 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.

- From Sue Froggatt Training & Consulting – Specializing in Membership Development.