



**IGNITING
LEADERSHIP
FOR POWER
PURPOSE
& IMPACT**

Facilitating Board Effectiveness – A Forum for Discussion among Consultants and Capacity-Building Organizations (CBOs)

Patty Oertel, Co-Chair, CBO Affinity Group, Alliance for Nonprofit Management

Your Team



Patty Oertel
CBO Co-Chair

Ms. Oertel has over 40 years of experience with increasing the capacity of nonprofit organizations and fostering capacity building organizations (CBOs) including leading the Center for Nonprofit Management in Los Angeles for many years.

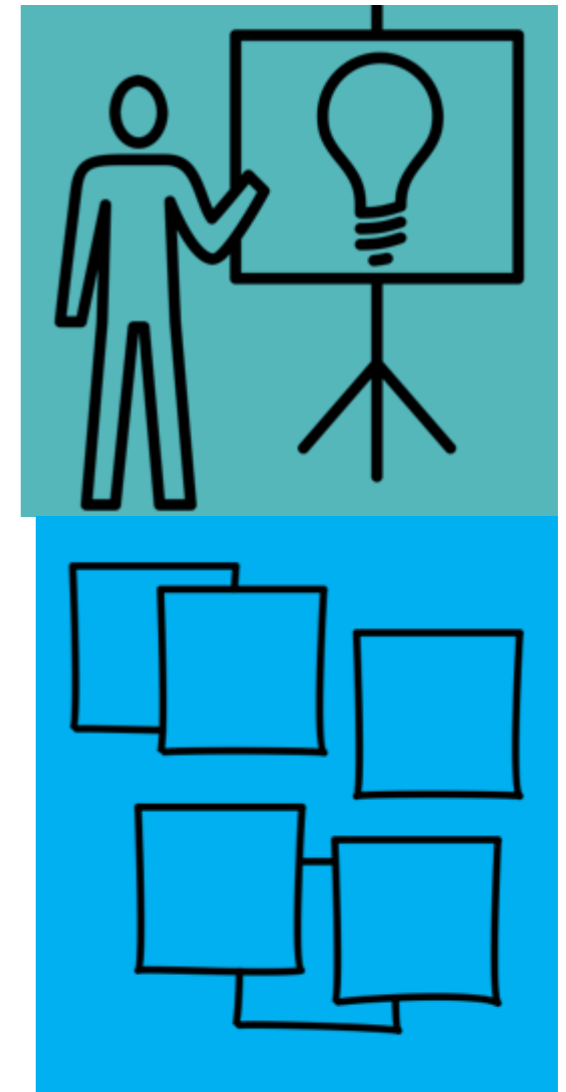
Goals for Session

- Provide a forum for capacity building organizations and consultants to understand the different ways we assist nonprofit organizations to have more effective boards.
- Share their challenges in providing board governance services and learn from their peers.
- Review input from a national survey of nonprofit capacity building organizations across the country regarding their board governance services and challenges faced in providing such services



Who's in the Room? Expectations?

- To maximize our short period of time, you have been provided with a set of post-its to use in identifying the type of services you provide and the questions you most want answered/discussed during this session.
- Write your name on each of the post-its on your sheet.
- Move around the room placing your post-its on the flip chart sheets covering the different types of board development/governance services and what you most want to know from your peers. Add new questions on the blank sheets.
- We'll learn who is in the room and how best to spend our time together. Get up and move around.



Survey of CBOs Across the Nation

Survey by Capacity Building Affinity Group, Alliance for Nonprofit Management

24
Organizations
Completed
Survey

13 States
Represented;
Multiple
Responses from
NY, CA, PA

Reflect the breadth
of CBO models –
free standing, part
of a United Way,
Foundation,
University

Reflect small
markets and
large urban
areas

Mix of Services
and Programs

CBO Board Governance Services

The following reflect responses to whether the CBO provides a specific service:



Board Training Sessions – Customized for a Specific Nonprofit Organization

85%



Board Training Sessions – Public Seminars or Cohort Model

80%



Executive Director/CEO Coaching Related to Work with the Board of Directors; Board Chair Coaching = 55%

80%



Assisting in creating board manuals

55%

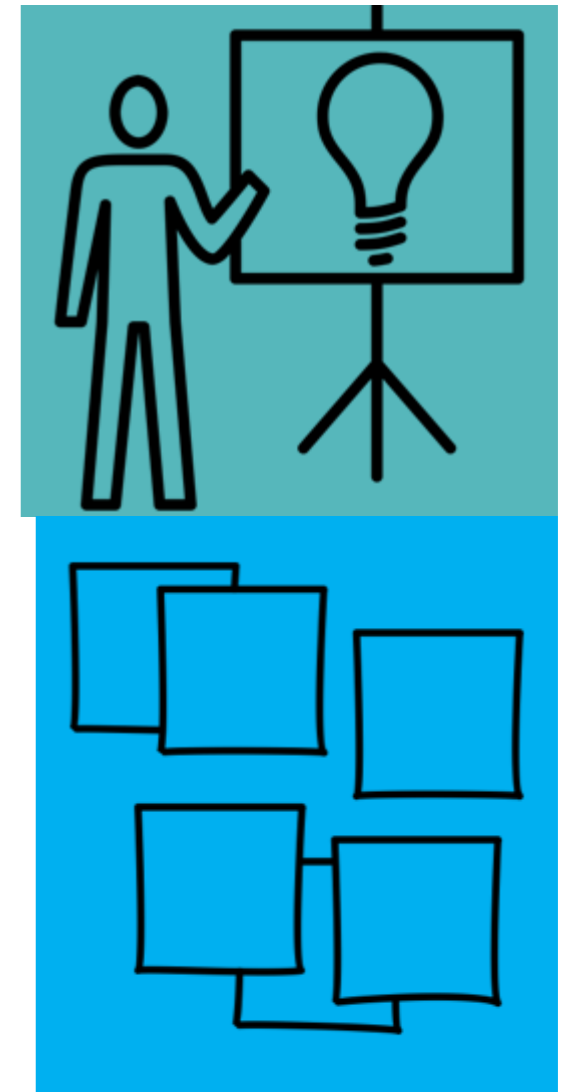
How do we compare?

Based on introductions, post-its, etc., how do you compare to our survey sample?

- By services offered?
- By geography?
- Other?
- *Any thoughts about demographics of capacity building organizations and capacity builders? Other ways you look at the field? Services needed by nonprofit organizations not offered, not in sufficient supply to meet demand?*

Board Development Challenges

- Time of board members to do their work and be engaged; fatigue.
- Group dynamics/organizational culture.
- Board members not understanding and/or accepting their role in fundraising.
- Willingness to seek and/or accept help.
- Less common models (e.g., government appointed board members, member-elected boards, government funding dictated board composition, specific state law requirements, etc.)



How do we compare?

Based on introductions, post-its, etc., what do you see as challenges?

- *Any additional thoughts on challenges to building the capacity of nonprofit boards of directors?*

Small Group Discussion

Identify Key Challenges Warranting Small Group Discussion

Topic One

Topic Two

Topic Three and/or Four

Small Group Process

- Formation
- Select a Spokesperson
- Talk freely
- Agree on 2-3 Key Points (time prompt will be provided)

Time

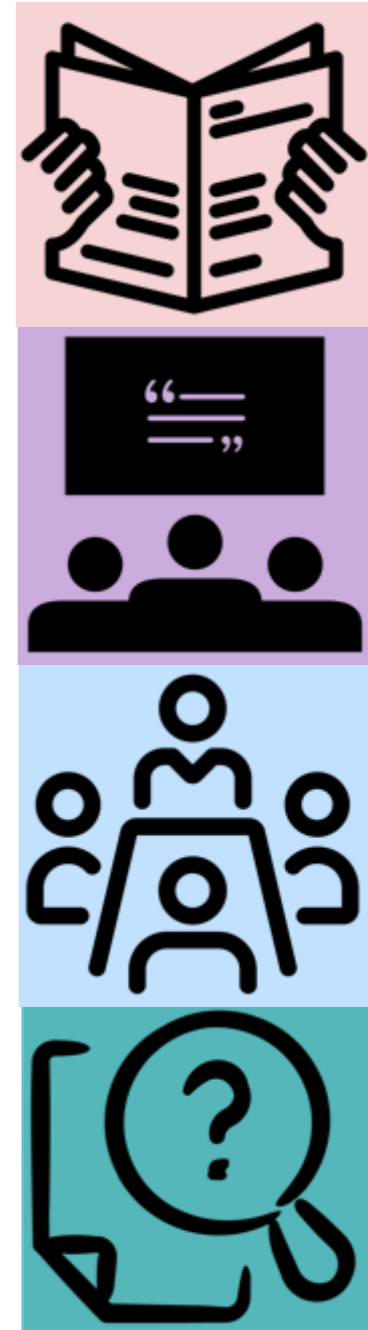
Small Group Reporting

Topic, Key Points

- Topic
- Key Points
- Conclusions,
Next Steps

How do we learn? Build skills?

- Professional associations - BoardSource
- Conferences, summits, symposium, training sessions
- Trade journals (NPQ, SSIR)
- Research, white papers
- Internal meetings, meetings with colleagues.
- Other?
- *How you learn? Build skills?*



What else would you want to know?

- Strategies for most significant impact on increasing board effectiveness
- Proven strategies for moving nonprofits from a short-term training to more extensive and impactful engagement
- List of board assessments with descriptions of focus, cost and perceived benefits
- Staffing and scaling board-related services
- *What else would you want to know?*



Q&A / Thank you

