

Glocal Rapid Board Assessment and Development Tool - Overview

Background: All organizations need to periodically assess their organizational performance and gain insight into what they do well, how to further develop and strengthen their impact, and the skill sets and types of leaders necessary to move them to the next stage. Most go through cycles, when the leadership needs to be re-energized, and possibly re-trained on aspects of their roles. Many small and medium sized non-profits recognize the need, but cannot afford Board Assessment and Development at current market prices or levels of effort. Based on Glocal's experience and results working with more than two dozen organizations and Boards, we developed this tool (sometimes known as the "RBA") to provide a quick and affordable assessment of a Board's efficacy, and actionable recommendations on how to grow stronger, both as a Board and as an organization.

Purposes of this tool:

1. To assess the basic structure, composition and processes of the Board, in light of the needs of the non-profit organization;
2. To gain a quick understanding of what is going well and which areas need development;
3. Assess how well Board time and talent are currently used, and whether the culture and structure encourage differing views and thoughtful, productive discussion;
4. Spark a candid and engaged discussion about the best path to further developing board engagement, motivation, and performance.

Design: Created to meet a non-profit-organization's (NPO) need for Board effectiveness assessment in a way that is quick, affordable, and actionable - providing insight into strengths and areas to develop. Questions cover Board infrastructure and processes (bylaws, member selection, committees, Board functions, training, etc); Board member profiles (the necessary mix of hard and soft skills) and participation; and the structure and culture of Board meetings and discussions. Everything is designed with the Pareto principle in mind – you get 80% of your results from 20% of your efforts. Interview questions thus address the main concepts and some representative details; and a cross section of the Board, rather than every member, is interviewed. Furthermore, rather than the detailed self-assessments and customary 30+ page reports, the RBA report is purposefully succinct (7-10 pages), for legibility; and recommendations are actionable, informed by our own Board and field experiences.

Necessary Interviewees – Generally, six interviews are conducted. It is recommended that the interviews include at least one employee who works closely with the Board and at least three Board members representing a diversity of backgrounds, thinking, and Board experience. The other interviewees can be either Board members or Senior Staff. For organizations with a particularly large Board, a larger sample can be included in the interview process.

Process – In order to ensure an efficient and streamlined process, it is recommended that the interview calls (50-60 minute each) be scheduled on a single day. Following the calls, we will synthesize the discussions and develop a report that outlines a Board's role, the observed strengths and potential challenges faced by the Board as well as recommendations on how the organization can further grow and better leverage its Board. A week to 10 days after the report is submitted, we convene a 30-60 minute wrap-up conference call to review the report and recommendations, as well as answer any questions on how to best use the report in further Board development.

If you would like follow-on Board Development and training, we offer strategic planning facilitation, as well as workshops in the main areas Board members find challenging - namely fundraising, financial oversight and due diligence, program design and evaluation, and delineating Board and Staff responsibilities.

If you have any questions, give us a call at +1-773-218-8270 or +1-347-480-8679, or send along an email.