

## SPiN: Strategic Planning in Nonprofits

# Tools for Aligning Your Board and Strategic Plan

### Board Strategic Needs Table

Identifying the goals of your organization is key to understanding what roles the members of your board will play when delegating responsibilities. Additionally, an organization must be able to match the skills of each board member with the appropriate role and responsibility to be as efficient as possible.

It is important to define which goals and what timeframe your organization will be working to complete them. Are they long-term or short-term? It needs to be clear as to what your organization is trying to accomplish so that you can determine the correct board members moving forward.

The Strategic Needs Table created by the Georgia Center for Nonprofits is a great tool for beginning that process.

**Step 1:** List your organization’s goals across the top row from left to right in order of importance.

**Step 2:** Beneath each goal, you will need to identify which skills will be needed to carry out the activities required to achieve that specific goals.

*Examples:* Finance, Legal, Fundraising, Real Estate, Media, Business, Sales.

**Step 3:** Look across the goals you’ve laid out. Do you see any skills that repeat themselves? If so, these are your most critical skills that you’ll need to have on your board.

**Step 4:** Now you’ll need to identify which board members have the skills you need most. This will guide the decisions you make while determining the committees that you create within your board.

If you are lacking critical skills for certain goals that you need to accomplish, you should consider bringing on someone to your board with those skills, or rethink the capacity of your organization’s ability to achieve that goal. Utilize the resources you have now, and work to build around the resources you need in the future.





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Use this **Strategic Needs Table** to list strategic goals and the skill sets needed to execute the strategies involved.

Strategic Needs Table				
GOAL 1 (e.g., Open new facility)	GOAL 2	GOAL 3	GOAL 4	GOAL 5
Skill set 1 (e.g., Commercial construction)				

Provided by the [Georgia Center for Nonprofits \(http://www.gcn.org\)](http://www.gcn.org)





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### Current Board Inventory Tool

Now that you've laid out your board's strategic needs for your organization and what skills are desired for your project, you can take an inventory of who is already on your board.

**Step 1:** List your current board members in the left hand column.

**Step 2:** Discuss what skill sets they have and list them in order of capability in each corresponding row.

**Step 3:** Compare your board inventory with your board strategic needs table.

Which holes need to be filled? What skills does your organization still require?

At this point your organization might need to rethink certain goals listed in the board strategic needs table. Again, working with resources you already have is important right now. Moving forward, you can create a Board Development committee to work to expand your board for more specific skill sets.

Use this **Current Board Inventory** template to list current board members in the left-hand column and the skill sets needed from the Strategic Needs Table across the top.

Current Board Inventory				
PRIORITY SKILL SETS	SKILL SET 1	SKILL SET 2	SKILL SET 3	SKILL SET 4
<b>Board Member A</b>				

Provided by the [Georgia Center for Nonprofits](http://www.georgiacenterfornonprofits.org)

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### Committee Development Tool

Developing committees within your organization can be a difficult process. Often times, nonprofits create too many committees and end up focusing on the wrong goals which is not an effective use of time, energy and resources.

At this point, your organization should have (in some capacity) outlined your board's strategic needs and goals as well as utilized a board inventory tool to find out what your organization already has to offer.

Now it's time to set up committees. There are many different types of committees found in nonprofit organizations including but not limited to:

- Executive Committee
- Governance Committee
- Development Committee
- Nominating Committee
- Finance Committee
- Audit Committee
- Personnel Committee
- Strategic Planning Committee
- Promotion Committee
- Marketing Committee
- Human Resources Committee
- Board Development Committee
- Program Development Committee
- Assessment Committee
- Legal Committee

Obviously there are a lot of different directions you can go in deciding which committees to create to more efficiently delegate responsibilities to members of your organization. It all really depends on the **size of your board** and **the capacity of your organization**.

How many volunteers does your organization have? How many staff? What is your budget? These are important questions that need to be answered before developing committees.

For this toolkit, I will suggest beginning with an Executive Committee. All other committees should be formed from your board strategic needs table and thus aligned with your strategic goals. Additional templates are attached to consider developing other committees based on your organization's strategic needs.





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### Executive Committee

Functions:

- Set agenda for board meetings
- Deal with major issues in a timely manner between board meetings
- May serve other functions, especially in smaller organizations, such as financial oversight, board recruitment or strategic planning (you decide and modify this description to fit your needs).

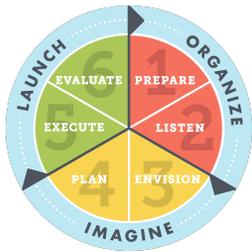
Members (usually all board officers, but may also include at-large members):

\_\_\_\_\_ **Committee**

Functions:

Members:





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\_\_\_\_\_ **Committee**

Functions:

Members:

*This tool was developed for SPiN by Chase A. Munroe, University of Washington Evans School of Public Policy and Governance, in Spring 2016.*

