



TRAINING FOR YOUR BOARD OF DIRECTORS AND STAFF MEMBERS

By Timothy S. Jacobson
~The Nonprofit Provocateur~



The board and staff of every organization need recurring training to stay sharp

Leaders strive to be lifelong learners. Professionals such as doctors and attorneys take continuing education courses on a regular basis to maintain their licenses. Seminars and webinars are everywhere. Stephen Covey, author of the book *The 7 Habits of Highly Effective People*, counseled people to take time to “sharpen the saw.”

Why is it, then, that so many nonprofit boards and their staff members do not make a regular practice of receiving training?

Undoubtedly, people fall back on the usual excuses: *training is too expensive, or I don't have time for training, because there's too much work to do.*

If you were driving across the state for a meeting with a donor, client or policymaker, would you be so busy and so tight with money that you'd refuse to stop to gas up the car? Would you make it to the destination and back if you were “too busy” to gas up?

Receiving training is like putting fuel in a car. It helps ensure that there is inner energy to accomplish the desired outer movement of the vehicle. Keep your organization fueled and tuned up so that you can maximize opportunities to achieve the mission.

Typical Areas of Training Deficiencies

Recently, I attended a webinar for consultants trained by the Land Trust Alliance to conduct guided organizational assessments using the “Assessing Your Organization” (AYO) protocol. All of the consultants were presented with a warm-up question for which we had to type our answer for the whole group to see. The question was, what types of training do nonprofit boards most need? The most common responses included training about how to engage in fundraising, improving financial literacy, and understanding the role of board members vis-à-vis the staff. How does this compare to your experience with nonprofit boards?

Many volunteer board members, and even many professional staff members, struggle to understand common financial reports such as a balance sheet, a profit and loss statement, and an actual vs. budget comparison. They don't know what to look for to assess the organization's financial strength and stability. There's nothing for non-accountants to be ashamed of in terms of struggling to understand these reports., at least initially. But if an organization neglects to provide recurring training on this subject and if the finances run off the track, board members need to ask themselves whether they're neglecting their fiduciary duties in not getting this training. Board presidents must be assertive in ensuring that proper training is made available. Executive directors should encourage such training and help identify sources for the training.

Also, many nonprofits needlessly struggle financially as a result of having board members who are not actively engaged in using their connections in the community for fundraising purposes. Having a fundraising board does not mean that board members have to cold-call potential donors. There are many things board members can do to help with fundraising. If that's not happening, then training must take place.

In addition, do board members truly understand what their role is? Often, an awkward and painful dance takes place between board members and staff members of nonprofits due to a lack of understanding about their respective roles. This problem is especially acute for nonprofit organizations transitioning from an all-volunteer state of affairs in which board members do all of the work of implementing the mission to an organization with paid professionals on staff who should be running the day-to-day operations. For example, board members sometimes struggle to understand the notion that their power comes from collective votes taken at board meetings, rather than them, as individuals, exercising direct authority over the staff. Often, friction can be minimized through the board passing a written policy delineating these roles and then reminding itself periodically of what the policy says.

Governance is a leadership process, and to function effectively, individual board members and boards as a whole, should have a clear understanding

not only of their governance roles and responsibilities but also how to practically and correctly apply them within a leadership framework or context. Thus regular governance training is essential for non-profit boards.

From www.betterboards.net/governance/governance-training/

Sources of Training

For organizations in certain fields, there may be umbrella organizations or trade associations that can provide training. The Land Trust Alliance is an excellent example. LTA provides a range of training opportunities for nonprofit land trusts.

Sometimes training must be accessed by attending a conference or seminar. Other trainings are available through webinars or phone seminars, which are really convenient and often fairly inexpensive, especially if several people can huddle around a speakerphone or computer. Sources for training include:

- BoardSource - www.boardsource.org
- Institute for Conservation Leadership – www.icl.org
- Land Trust Alliance - www.landtrustalliance.org/training

Often the best training results from bringing an expert into a board or staff meeting for more individualized instruction. For example, nothing beats having a fundraising consultant attend a special training meeting of the board of a particular organization and receiving training that's customized to the needs of that organization.

Express Learning Kits from LTA

Bringing Experts To Your Conference Room

Have you been looking for an easy and effective way you and your team can train together without the long travel, hassle or expense?

The Land Trust Alliance recently announced a new training option that conveniently brings you the expertise of national leaders – direct to your land trust office. Each Express Learning Kit contains everything you need:

- Short, 20-30 minute webinar video-recording (or recordings) by a topic expert;
- Facilitator's guide to lead the group;
- Participant discussion guide or exercises and;
- List of additional resources

It's fast, convenient, portable, and quality learning for everyone. Even organizations that aren't land trusts can benefit from the financial topics covered.

Easy to use!

Gather your team together, broadcast the webinar recording and then dive into the exercises or discussion. You'll be amazed what you discover about your skills, strengths and improvement areas. And, if new team members come on board—you can keep the recordings and exercises to share with them.

Enhance the training by bringing in a local nonprofit consultant to act as facilitator and to customize the training to your organization's needs and to answer your specific questions.

Great topics!

The first set of learning topics that are available are focused on strengthening your team's financial acumen:

- How to Ask for Major Gifts: Maximizing Your Fundraising Team's Impact
- Powering Up Board Financial Oversight, addressing both staffed and all-volunteer land trust considerations.

Kits are \$45 for Land Trust Alliance members (\$55 for non-members), and available for purchase now.

Conclusion

Visjonær Consulting can provide you with Express Learning Kits and other forms of board and staff training, and we can facilitate your discussions. Whether the subject is fundraising, marketing, strategic planning, organizational assessments, understanding financial reports, board development, or board-staff relations, we can help. Contact Visjonær today for a free consultation about a range of training options and topics.

Check out the author's website at www.visjonær.com, Facebook page at www.facebook.com/Visjonær and find him on Twitter at www.twitter.com/TimoJacobson

How has your organization handled training? Does it occur often enough? What benefits have you seen? Share your stories!



Tim Jacobson, CEO of Visjonær Consulting, has served as a board member and executive of a variety of nonprofit and for-profit organizations over the past two decades. He's author of the book *Explosive Marketing for Nonprofits: Trajectory for Success*, to be released in 2014, the executive producer of a documentary film, *Mysteries of the Driftless*, broadcast on PBS, and author of Amazon best-selling thriller *The Kurchatov Penetration*. He has been featured dozens of times by TV and radio stations, magazines and newspapers for his organizational consulting, filmmaking, writing, conservation and legal work and for his exploration of international justice and peace issues.

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