

Sample Board Development Needs Survey

Following are categorized lists of competencies and skills which, in most associations, would be helpful for board members to have in fulfilling their roles. On an annual basis, board members should be asked to self-assess their knowledge level for each of these – either orally or via a survey instrument. The results should influence completion of an annual calendar of board education.

Consider using the following 5-point scale in assessing competency and skill attainment:

- 5 = Expert, could help others.
- 4 = Good knowledge and understanding of the content
- 3 = Neutral, have average knowledge of the topic
- 2 = Know basics. Need more information for better understanding
- 1 = Limited experience or knowledge in this area.

GOVERNANCE AND OPERATIONS TOPICS

1. Process for board and staff decision-making.
2. Board Member legal obligations and responsibilities.
3. Board Member fiduciary responsibilities.
4. The organization's bylaws and policies.
5. Board role in the performance evaluation of the CEO.
6. Roles and responsibilities of board committees (Governance, Finance, etc.).
7. Role and rules for Executive Sessions of the board.

FINANCE

1. Financial reports presented by the Treasurer and Finance Department including balance statements, income and expense, and other periodic reports.
2. The organization's investment policies in related decision-making.

EFFECTIVE USE OF TECHNOLOGY

1. How to access and effectively navigate the *Members Only* and *Board Only* sections of the web site.
2. Handling of and organizing large volumes of e-mail

ACCOUNTABILITY

1. Familiarity with the organization's conflict of interest policy.
2. Confidentiality issues regarding board discussions and executive sessions.

PARLIAMENTARY PROCEDURE

1. Basics of parliamentary procedure.
2. Parliamentary procedure during board meetings.
3. Procedure to be followed in the recording and approval of minutes.

STRATEGIC DIRECTION

1. The role of the board in the strategic planning process.
2. The process for the organization's strategic and operating plans to guide resource allocation.
3. The process for how strategic and operating milestones are tracked and reported.

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MAPPING THE FUTURE

Use the following 5-point scale in identifying importance of the following topics in board education and development:

- 5 = Very high priority.
- 4 = High priority.
- 3 = Neutral.
- 2 = Low priority.
- 1 = Very low priority.

Potential board education and development topics:

1. Trends in association management
2. Leadership development before members reach leadership positions
3. Training in global thinking
4. Training on interacting with the media.
5. Clarification of the organization's portfolio of products, services, and programs
6. Time management instruction
7. Use of computer technology and conservation of resources

Please list other areas of Board Development or Education that would be helpful to you in becoming an effective board member.

Please prioritize the following with regard to your preference for learning. 6 is most preferred; 0 is least preferred.

- _____ Case studies
- _____ Training by non-staff expert
- _____ Guidance from staff
- _____ Articles from industry-appropriate journals
- _____ Online learning modules
- _____ In-person workshops located locally to me