

Agency Executive Committee Training

Survey responses

n = 21 through September 4, 2024

The survey asked about nine potential training topics related to board operations in charitable organizations. The graph below lists them with the number selecting the topic for additional training.



Each of these nine had one or more discrete practices that boards could take Always, Often, Rarely or Never. Examples include “All board members financially support our organization with a contribution” and “Committee structure is explicitly designed with clear charter around organizational priorities.”

Among both board members and staff members taking the survey, 18 (80%) identified fundraising and resource development as an important topic. People in this survey agree that board members at their agency make financial contributions. There is a difference in staff and board member perceptions about the frequency with which boards address resource gaps as part of the financial planning:

Board members: 33 percent agree* that the board addresses resource gaps

Staff members: 50 percent agree that the board addresses resource gaps

* Selected Always or Often take the action

People could select up to five training topics. The other top four have fewer responses than fundraising but a higher “gap” in the frequency with which organizations act consistently with the desired good practice(s).

RECRUITMENT FOR THE BOARD

Staff are MORE likely to want training on recruitment strategies (83%), perhaps because 67 percent of board members say that their board rarely or never assumes responsibility for recruitment of new talent to the board. Fewer than half (47%) of board members selected recruitment for additional training.

STRATEGIC PLANNING & GOAL SETTING

Among board members, 60 percent said that additional training for planning and goal setting is important, compared with 33 percent of staff. For both board and staff, about half agree that their organizations have strategic plans and more than half say both board and staff take ownership. There is a large need, though, in translating the plan into a concrete set of goals.

Board members: 67 percent said their organization rarely or never creates concrete goals and two people didn’t respond to the question. In effect 80 percent of board members think there is opportunity for improvement in setting concrete goals.

Staff members: 67 percent said their organization rarely or never creates concrete goals

SELF-ASSESSMENT AND EVALUATION

Staff members were more likely to identify this as a training need (67% compared with 40% of board members), but more than 80 percent of both groups said their organizations rarely or never do this.

ROLES AND RESPONSIBILITIES

This was the third-highest topic among board members, after fundraising and planning/goal setting. More than half of board members selected this for training (53%). Only one (of six) staff members thought this was an important topic (in their top five).

One area of potential concern was the low percentage who said their boards often or always discuss where the organization should be in five years. Among board members, 73 percent said their board does NOT discuss this forward vision and for staff, it was 67 percent.

Other responsibilities, such as CEO evaluation, being informed about current operations, and outreach to the community were reported as occurring often or always by at least 41 percent of both board and staff members.

SUMMARY RESULTS FOR SURVEY IN TABLE FORMAT

The table below shows, for each statement of how a board performs, the percentage of survey participants who agree (say the board does this always or often). It also shows the performance statements within the nine training topics. One statement is not shown: Board expertise addresses most of the organization's needs. All but one person in the study agreed with that.

Results by Statement for Agency Committee Training Survey

Topic in bold . Statement about practice boxed.		Maximum for Each Cell is 100 Disagree is (100 -- Agree)	
Tint = < 40% agree that practice is Always or Often.		Board Agree	Staff Agree
Board member orientation and training			
Our board assumes responsibility for recruitment of new talent to the board.		53	33
We have a clear process for selecting and transitioning board and committee leadership.		53	67
We have a systematic process for identifying needed board skills, driven by the strategic plan.		20	67
Effective board meetings			
All board members discuss where the organization wants to be in 5-10 years.		20	33
Committee structure is explicitly designed with clear charter around organizational priorities.		40	67
Board roles and responsibilities			
Board members receive regular updates about the organization's performance to plan.		67	50
The board evaluates CEO performance at least annually.		47	83
Board members proactively reach out in the community to build awareness and excitement about our organization.		47	67
Fundraising and resource development			
All board members financially support our organization with a contribution.		93	83
Our board actively addresses resource gaps as part of their financial planning.*		33	50
Board diversity and inclusion			
All board members engage in meeting discussions; meetings are rarely dominated by a few voices.		87	100
(One could also consider the process of recruitment for skills here, the last item in the first topic for Board member orientation and training.)			
Strategic planning and goal setting			
We have a current, robust strategic plan covering key strategic elements.		40	50
Board and staff share ownership of the strategic planning process.*		53	83
Our board translates the strategic plan into a set of concrete goals for the board and board committees.		20	33
Financial oversight and budgeting			
The board is active in preparing and reviewing multi-year financial plans.*		33	67
Board self-assessment and evaluation			
The board assesses its own performance at least annually.		13	17

NOTE: Percentages are based on six staff members and 15 board members. Non-responses are taken as "Don't Know" or "Won't Say." They are taken as part of the participants who do NOT agree that the behavior occurs Always or Often.

* 12 responses from board members.