

Template of Training Requirements For Elected Board Members of Membership Bodies

<i>Tùy chỉnh mẫu để phù hợp với đặc điểm doanh nghiệp</i>	Essential (E) or Optional (O)?	Delivery: ☞ Internal (I) or ☞ External (E) trainer or facilitator?
1. General Orientation & Training		
1.1 About the Association		
Mission, Vision, Culture & Values		
Strategy –The strategic plan		
Planning - The strategic planning process		
Objectives & Goals - short, medium and long term; the priorities.		
Budget and Finance		
Organizational structure –departments, committees and sub-committees, branches		
Positioning in the sector v. other associations		
Community & Members –Categories, penetration of & characteristics e.g. demographics, relationships with external influencers		
Future trends affecting the sector & industry		
Equality, diversity and generational synergy		
Other:		
1.2 Roles, responsibilities & accountability of nonprofit boards		
Elected board members do not get involved in the associations day-to-day affairs		
Governance		
Legal responsibilities, board member liability and other legislation, regulations and by-laws		
Policy development		
Other:		

1.3 Committee information ¹		
Term of office & title		
Meeting frequency and attendance expectations		
Minutes and agendas		
Time commitments		
Rules of conduct		
Relationship with paid staff and other board members –roles and who does what when		
Task descriptions –specific duties and responsibilities of roles e.g. secretary		
Board duties		

Payments and expenses		
Benefits of being a committee member		
Key staff contacts		
Contacting the association		
Information flow to board members		
Preparing for board meetings		
Resources available		
Skill sets, experience and qualities required and training opportunities		
Performance review		
Internal controls		
Dress code		
Boundary exercises		
Removal of board members		
Other		
1.4 Other roles and assignments e.g. Honorary Officers, Special Roles and other volunteers		
1.5 Organizational policies and procedures –general & specific		
1.6 Resources available e.g. web site orientation, key documents, library researchers, etc		

2. Specific Skill Set Training		
How boards add value including case studies of effective boards and warning signs of problems ahead		
Preparing for meetings and being a good meeting participant.		
Chairing meetings		
Presentation skills		
Report writing		
Time management –including dealing with interruptions		
Giving and receiving feedback		
Negotiation skills		
Strategic planning		
Priority management		
Managing change		
☞ Listening skills		
☞ Project management		
☞ Team building		
☞ Change management & dealing with change		
☞ Rivalry in the boardroom including handling disagreements & infighting, competing agendas – conflicts of interest and dealing with difficult trustees		
☞ Problem solving		
☞ Decision making		
☞ Financial management - reading accounts, budgeting, fund raising, financial reporting & accountability		
☞ Delegation skills		
☞ Risk management		
☞ Leadership skills		
☞ Resource management		

☞ Evaluating board performance and self assessment – overall and individual members		
☞ Establishing process and systems		
☞ Influencing without authority		
☞ Accepting responsibility		
☞ Articulating goals		
☞ Working with partners and alliances		
☞ E-communication & social media skills		
☞ Other		
3. For the Leaders		
☞ Building relationships between President, CEO & Chair		
☞ Succession planning		
☞ Governance		
☞ Recruitment and selection of board members		
☞ Core competences of board members		
☞ Designing an effective board member induction program		
☞ Board size and composition		
☞ Performance evaluation		
☞ Other		
4. Other Training		
NB: This is likely to depend on your mission & constitution priorities e.g. influence v. lobby.		
☞ Media relations and promoting the association		
☞ Advocacy, lobbying skills & parliamentary procedure		
☞ Industry resources		
☞ Working with specific technology		
☞ Other		
5. Other		