

# Board Development Plan Templates

Simplify the process and help your organization increase board efficiency  
and effectiveness

## Table of contents:

<a href="#"><u>1. Template 1 — Board Development Strategy</u></a>	4
<a href="#"><u>2. Template 2 — Board Development Action Plan</u></a>	7
<a href="#"><u>3. Template 3 — Board Self-Evaluation Survey</u></a>	9
<a href="#"><u>4. Template 4 — Board Development Proposal Plan</u></a>	10
<a href="#"><u>5. Template 5 — Board Development Plan</u></a>	11
<a href="#"><u>6. Template 6 — Board Professional Development Plan</u></a>	11
<a href="#"><u>7. Template 7 — Board Development Plan Manual</u></a>	12
<a href="#"><u>8. Best practices for using board development plan templates</u></a>	12
<a href="#"><u>9. Summing up on building a strong and effective board</u></a>	13

Board development plans are crucial for ensuring that **a board has the skills, knowledge, and resources necessary to fulfill its duties and responsibilities effectively**. However, creating a comprehensive development plan can be complex and time-consuming.

To simplify this process and assist organizations in enhancing their board's performance and effectiveness, we have designed a range of templates that companies can use for developing their own board development plans.

You can find and download templates right below:

- ▶ **Board Development Strategy**
- ▶ **Board Development Action Plan**
- ▶ **Board Self-Evaluation Survey**
- ▶ **Board Development Proposal Plan**
- ▶ **Board Development Plan**
- ▶ **Board Professional Development Plan**
- ▶ **Board Development Plan Manual**

# Template 1 — Board Development Strategy

**Description:** the template can be used by a nonprofit organization that wants to increase the diversity of its board, improve its fundraising skills, or improve its understanding of the organization's mission.

**Objective:** to help organizations assess the strengths and weaknesses of their board, identify areas for improvement, and develop specific goals and strategies to enhance the board's performance.

Aspect	What to include	Findings
<p><b>Introduction</b></p>	<ul style="list-style-type: none"> <li>▶ Brief overview of the organization and its mission</li> <li>▶ Explanation of the purpose of the board development plan</li> </ul>	<p><b>The XYZ Nonprofit is dedicated to</b> improving access to healthcare in underserved communities. As a nonprofit organization, we rely on a committed Board of Directors to guide our work and ensure that we stay true to our mission.</p> <p><b>The purpose of this board development plan</b> is to ensure that our board has the required skills and expertise to fulfill its duties effectively.</p>
<p><b>Board assessment</b></p>	<ul style="list-style-type: none"> <li>▶ Evaluate the board's current strengths and weaknesses</li> <li>▶ Identify areas where the board needs improvement</li> <li>▶ Analyze the results</li> </ul>	<p>An assessment of the Board's current strengths and weaknesses was conducted by an external consultant. The assessment included a review of Board governance practices, individual Board member performance, and the Board's understanding of the organization's mission and strategic goals.</p> <p><b>Key findings from the assessment include:</b></p> <ul style="list-style-type: none"> <li>• The Board lacks a clear understanding of its roles and responsibilities.</li> <li>• The Board lacks diversity.</li> <li>• The Board needs to enhance its fundraising efforts.</li> </ul>



Aspect	What to include	Findings
<p><b>Goals and objectives</b></p>	<ul style="list-style-type: none"> <li>▶ Develop clear and measurable goals for the Board's development</li> <li>▶ Prioritize areas of improvement</li> <li>▶ Make sure objectives align with the organization's mission and strategy</li> </ul>	<p>The following goals have been identified for the board's development:</p> <ul style="list-style-type: none"> <li>• Strengthen the Board's understanding of its roles and responsibilities.</li> <li>• Increase diversity among Board members.</li> <li>• Improve fundraising efforts to meet the organization's financial needs.</li> </ul> <p>Each goal has been prioritized based on its importance to the organization's success.</p>
<p><b>Strategies and tactics</b></p>	<ul style="list-style-type: none"> <li>▶ Outline specific strategies and tactics to achieve the development goals</li> <li>▶ Assign responsibilities for each action item</li> <li>▶ Establish a timeline for completion</li> </ul>	<p>To achieve the development goals, the following strategies and tactics have been identified:</p> <ol style="list-style-type: none"> <li>1. <b>Develop and implement a board orientation program</b> for new board members to ensure that they have a clear understanding of their roles and responsibilities.</li> <li>2. <b>Establish a board recruitment committee</b> to actively seek out and recruit individuals from diverse backgrounds to serve on the Board.</li> <li>3. <b>Create a fundraising committee</b> to oversee and coordinate fundraising efforts, including developing a comprehensive fundraising plan and identifying potential donors and sponsors.</li> </ol> <p>Responsibilities have been assigned to specific individuals or committees, and a timeline has been established for each action item.</p>
<p><b>Resources and budget</b></p>	<ul style="list-style-type: none"> <li>▶ Outline specific strategies and tactics to achieve the development goals</li> </ul>	<p>The resources required for the board's development include:</p>

Aspect	What to include	Findings
<p><b>Resources and budget</b></p>	<ul style="list-style-type: none"> <li>▶ Establish a budget for the plan</li> <li>▶ Identify potential funding sources</li> </ul>	<ul style="list-style-type: none"> <li>• Staff time</li> <li>• Consultant fees</li> <li>• Funding for educational programs and materials</li> </ul> <p><b>A budget of \$50,000 has been established for the plan,</b> and potential funding sources have been identified, including grants and individual donations.</p>
<p><b>Evaluation and review</b></p>	<ul style="list-style-type: none"> <li>▶ Establish a plan to evaluate progress toward the development goals</li> <li>▶ Determine criteria for measuring success</li> <li>▶ Regular reviews of the Board development plan</li> </ul>	<p>A plan has been established to evaluate progress toward the development goals, including:</p> <ul style="list-style-type: none"> <li>• Regular reviews of the board development plan</li> <li>• Individual board member evaluations</li> </ul> <p><b>Criteria for measuring success include:</b></p> <ul style="list-style-type: none"> <li>• Increased board member engagement</li> <li>• Increased understanding of the organization's mission and goals</li> <li>• Increased diversity among board members</li> <li>• Improved fundraising efforts</li> </ul>
<p><b>Conclusion</b></p>	<ul style="list-style-type: none"> <li>▶ Recap of the board development plan and its importance</li> <li>▶ Summary of key actions to be taken</li> <li>▶ Call to action for all board members to commit to the plan</li> </ul>	<p>This Board development plan is critical to ensuring that the XYZ Nonprofit is able to fulfill its mission and achieve its strategic goals.</p> <p><b>We call on all Board members to commit to this plan and work together to achieve its goals.</b> By doing so, we can ensure that our organization remains strong, vibrant, and effective in serving our communities.</p>

# Template 2 — Board Development Action Plan

**Description:** a clear and actionable plan for developing a board and ensuring that it has the knowledge, skills, and resources necessary to effectively guide the organization toward achieving its mission and goals.

**Objective:** help organizations assess their current board strengths and weaknesses, set clear goals for board development, and establish specific action steps, deadlines, and responsible parties to achieve those goals.

Objectives	Actions Steps	Deadline	Resources required	Responsible party	Status
<b>1. Improve board effectiveness</b>	1. Assess the current board	February 1, 2023	External consultant	Board development committee	Done
	2. Develop an action plan for improvement	March 1, 2023	Board training budget	Board development committee	Done
<b>2. Increase board diversity</b>	1. Identify diversity gaps on the board	April 1, 2023	Networking events budget	Board members, staff	Done
	2. Develop strategies for increasing diversity	May 1, 2023	Training and mentoring programs budget	Board members, staff	In progress

Objectives	Actions Steps	Deadline	Resources required	Responsible party	Status
<b>3. Improve board engagement</b>	1. Develop engagement strategies for board members	February 1, 2023	Board training budget	Board development committee	Done
	2. Implement engagement strategies	March 1, 2023	Regular board meetings with clear agendas and objectives	Board development committee	Done
<b>4. Improve board performance</b>	1. Develop a board self-evaluation survey	June 1, 2023	Board self-evaluation survey	Board development committee, staff	Planned
	2. Develop strategies on how to improve board performance based on the survey	July 1, 2023	Regular review of self-evaluation	Board development committee, current board members	Planned

# Template 3 — Board Self-Evaluation Survey

**Description:** a survey to assess the performance of a board in fulfilling its duties that consists of 14 questions covering areas such as teamwork, communication, risk management, compliance, diversity and inclusion, and succession planning.

**Objective:** to gather feedback from board members on the board's performance, strengths, and areas for improvement.

	Excellent	Good	Average	Needs improvement	Don't know
1. How would you rate the overall effectiveness of the board in fulfilling its duties?					
2. How well does the board understand its roles and responsibilities?					
3. How well does the board work as a team?					
4. How well does the board communicate with each other?					
5. How well does the board communicate with management and staff?					
6. How well does the board monitor and evaluate the performance of the organization?					
7. How well does the board manage risk?					

	Excellent	Good	Average	Needs improvement	Don't know
8. How well does the board address conflicts of interest?					
9. How well does the board ensure compliance with legal and regulatory requirements?					
10. How well does the board plan for succession?					
11. How well does the board ensure diversity and inclusion within the organization?					
12. What areas do you believe the board could improve upon?					
13. What strengths do you believe the board possesses?					
14. Any additional comments or suggestions for the board's improvement?					

The templates below are designed by various organizations and can also be adjusted and customized to the unique needs and goals of your board.

## Template 4 — Board Development Proposal Plan

**Description:** a board development plan for Public Health Wales that includes several training sessions and development opportunities for the board, including risk management, and leadership development.

**Objective:** to propose a plan for the board development over the next two years.

 Download link

## Template 5 — Board Development Plan

**Description:** a comprehensive plan prepared by the Executive Service Corps Of Washington that outlines the roles and responsibilities of the board and its committees, guidelines for meetings and agenda setting, etc.

**Objective:** to provide a framework for effective governance and management of the organization, as well as to ensure accountability and transparency in decision-making processes.

 Download link

## Template 6 — Board Professional Development Plan

**Description:** a plan consisting of board self-assessment, reflection, goals, action steps, timeframe, evaluation plan, and final evaluation.

**Objective:** to guide ongoing learning of board members and enhance the board's capacity to provide leadership.

 Download link

# Template 7 — Board Development Plan Manual

**Description:** a manual with 15 topic areas including board responsibilities, board composition, recruitment, orientation, training, board change, assessment, and evaluation.

**Objective:** to provide detailed information and resources to enhance the board's development.

 A light blue rectangular button with a white border. On the left side, there is a small red play button icon. To the right of the icon, the text "Download link" is written in a black, sans-serif font and is enclosed in a thin black rectangular border.

## Best practices for using board development plan templates

Board development plan templates are a useful tool for organizations looking to improve the effectiveness of their board of directors. However, simply using a given template is not enough to ensure success.

Here are some best practices that can help you maximize the value of board development plan templates:

**1. Customize the template to fit the unique needs of your organization.**

Take the time to review the template and adapt it to your organization's specific needs, culture, and goals. This will make the plan more relevant and effective.

**2. Involve board members in the planning process.** Encourage board members to participate in planning and provide and solicit feedback. This will



increase their sense of ownership and commitment to the plan.

3. **Evaluate and update the plan regularly.** Assess the progress of the plan and make adjustments at least once or twice a year. This will help ensure that the plan stays relevant and effective.
4. **Be realistic.** Set realistic goals for board development in terms of resources like time, money, and staff available to implement the plan.
5. **Be strategic.** Ensure that board development aligns with the organization's strategic goals and mission.

## Summing up on building a strong and effective board

A board development plan is a crucial tool for any organization seeking to build a strong and effective board. It helps ensure that **the board is well-equipped with the necessary skills, knowledge, and resources to fulfill its responsibilities and achieve the organization's strategic goals.**

If you're looking for effective tools and resources to simplify board management and development, consider the following:

- ▶ **Download the suggested board development plan templates** and customize them to fit the unique needs of your organization. This will simplify the process of creating plans from scratch and save time and resources.
- ▶ **Visit [board-room.org](https://board-room.org)** — a trusted resource for board members and organizations' leaders. The website offers articles, guides, and

- ▶ templates on topics such as board recruitment, orientation and training, strategic planning, and performance evaluation.
- ▶ **Leverage iDeals Board Portal** — a top board management software provider that offers a range of tools to schedule board meetings, manage board materials, conduct votes, assign tasks, and enhance board governance.

To learn more about iDeals products or have a sales, support, or billing request, navigate to <https://www.idealsvdr.com/contacts/>



### Support

[support@idealsvdr.com](mailto:support@idealsvdr.com)

### Call

United States  
888 927 0491

United Kingdom  
808 189 5055

### Visit

North American Office  
14 Wall Street, 20th Floor,  
New York City, New York, 10005,  
United States of America

European Office  
49 Queen Victoria Street,  
London EC4N 4SA,  
United Kingdom