

**WELCOME!**  
**July 26, 2024**



Order workbooks on Amazon:  
<https://amzn.to/3oBQQLy>

# ▲ *Permission Granted!* ▲

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Content adapted from:  
[www.BoardLeadership.org](http://www.BoardLeadership.org)

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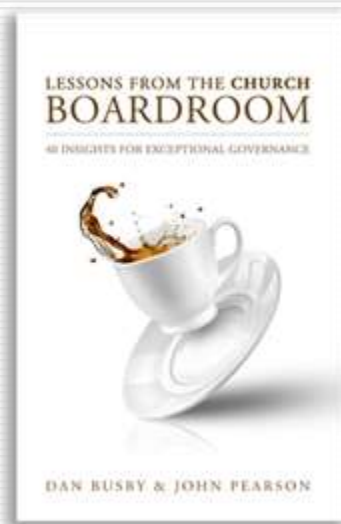
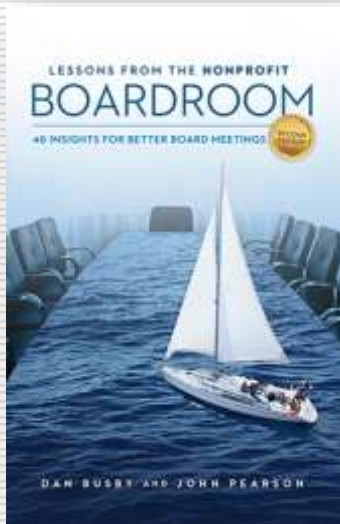


**M.J. Murdock**  
CHARITABLE TRUST

# DELEGATE YOUR READING!

<https://www.managementbuckets.com/johns-books>

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➡ **TOOL #19:**  
**Ten Minutes  
for Governance**

## ➔ **TOOL #4: Five-Finger Feedback**

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### Fast Feedback Tool!

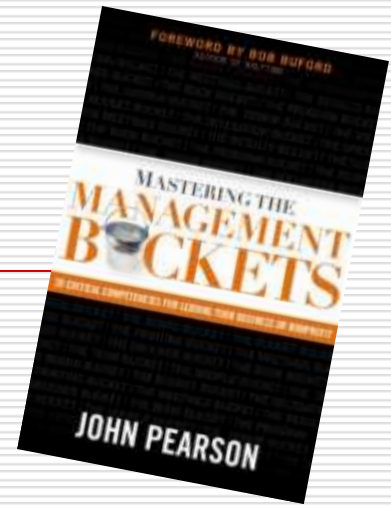


### Commentary:

<https://ecfagovernance.blogspot.com/2019/11/tool-4-five-finger-feedback.html>

# Think 4 levels versus... a drink from a firehose!

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## The Board Bucket:

- Level 1:** I don't know what I don't know.
- Level 2:** I know what I don't know.
- Level 3:** I have an action plan to address what I know I don't know.
- Level 4:** I am knowledgeable and effective in this core competency and can mentor others.



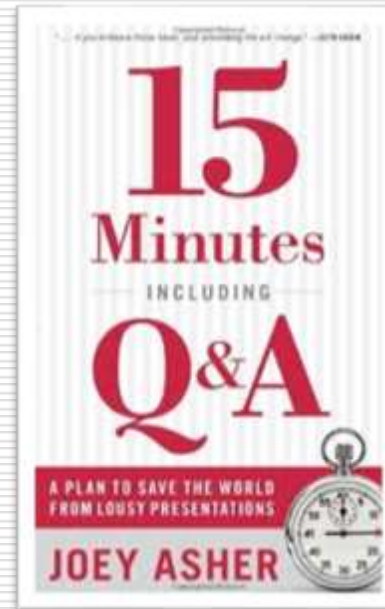
Ron Ellis / Shutterstock.com

# LIFELONG LEARNERS!

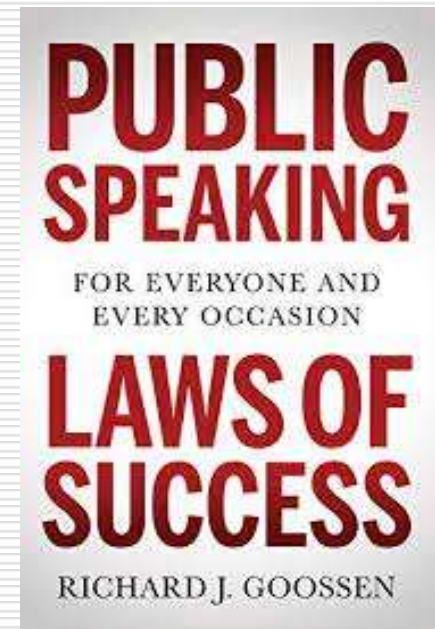
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**“An intelligent person is always eager to take in more truth; fools feed on fast-food fads and fancies.”**

*Proverbs 15:14 (MSG)*



The Most Dangerous 15 Seconds!



# Today's Color Commentary: David Schmidt

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**Disrupter (today only!):**  
Melinda Schmidt!





# THE 4 BIG MISTAKES TO AVOID WITH YOUR NONPROFIT BOARD

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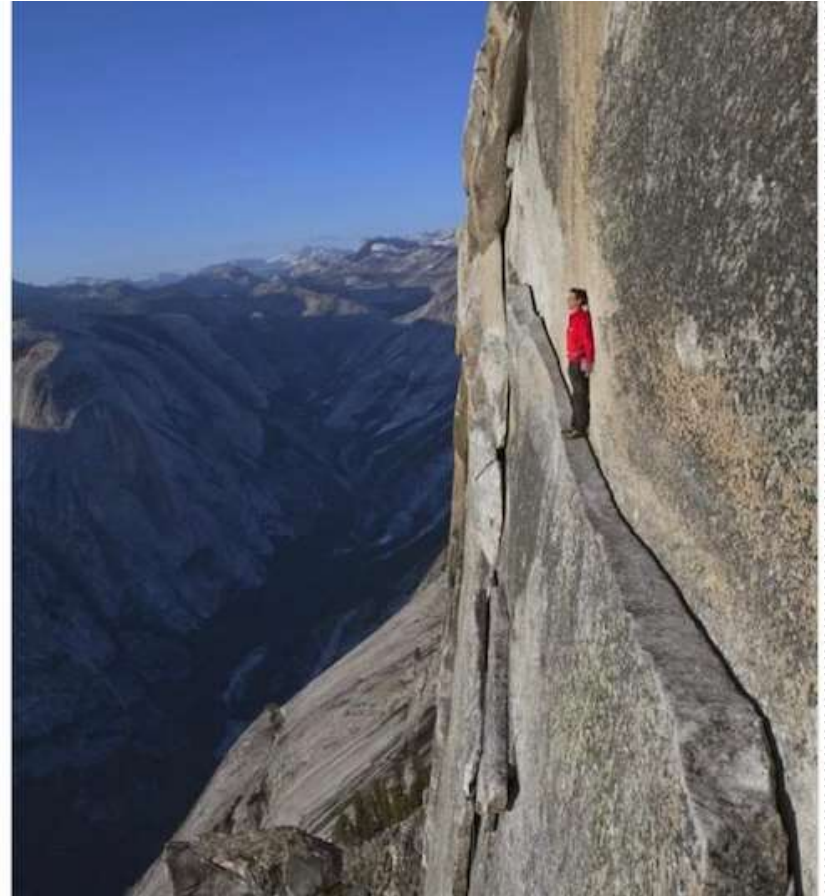
- ❑ **MISTAKE #1:** Not Landing on the Appropriate Sweet Spot on the Continuum Between Policy Governance<sup>®</sup> and Micro-Management!
- ❑ **MISTAKE #2:** Not Dating Board Prospects Before Proposing Marriage

# THE 4 BIG MISTAKES TO AVOID WITH YOUR NONPROFIT BOARD

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- ❑ **MISTAKE #3:** Not Leveraging God-given Gifts and Passion
- ❑ **MISTAKE #4:** Not Articulating and *Owning* the Ministry Strategy

The “Thank God Ledge” in Yosemite National Park ➡



# THE 4 BIG MISTAKES TO AVOID WITH YOUR NONPROFIT BOARD

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- ❑ **MISTAKE #1:** Not Landing on the Appropriate Sweet Spot on the Continuum Between Policy Governance<sup>®</sup> ...  
...and Micro-Management!

*How to increase engagement, commitment, and generosity—by understanding the **3 board hats**: governance, volunteer, and participant.*



# UNDERSTANDING BOARD ROLES: THE 3 HATS – p. 6

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## In this session:

1. **Book:** *Ten Basic Responsibilities of Nonprofit Boards*
2. **Video:** *Balancing Board Roles: The Board Member's 3 Hats*
3. **Exercise:** The Continuum Between Policy Governance<sup>®</sup> and Micro-Management!
4. **Insight:** What's All the Fuss About Policy Governance<sup>®</sup>?
5. **Tool:** The Board Member Annual Affirmation Statement
6. **Tool:** The Prime Responsibility Chart

**First...define reality!**

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***POP  
QUIZ!***

See page 6.

# Understanding Board Roles

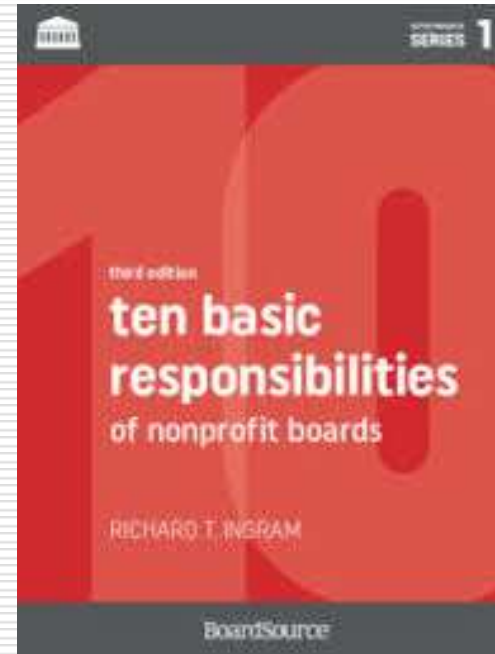
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## **#1. BOOK:**

### ***Ten Basic Responsibilities of Nonprofit Boards***

[www.BoardSource.org](http://www.BoardSource.org)

(page 7)



# Understanding Board Roles

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**#2. VIDEO:** <https://vimeo.com/67900544>

## The Board Member's 3 Hats:

- Governance
- Volunteer\*
- Participant



*\*Volunteering is optional, passion-driven, gifts-based*

# THE VIDEO: Balancing Board Roles

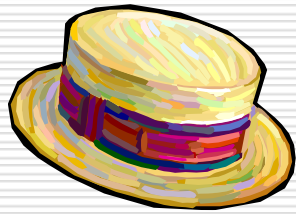
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<https://vimeo.com/67900544>

<https://www.ecfa.org/ToolboxSeries.aspx>



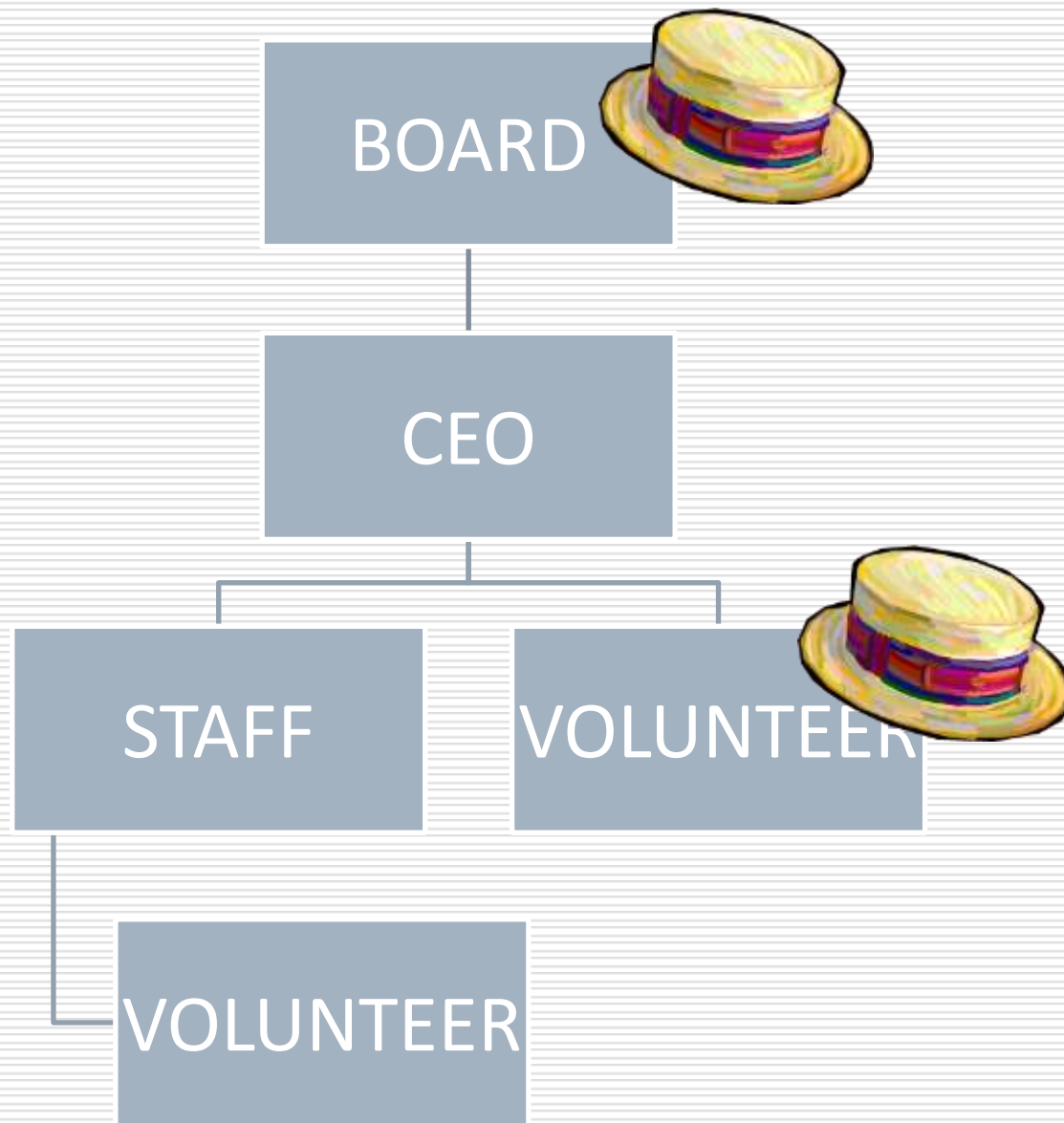


## Balancing Board Roles

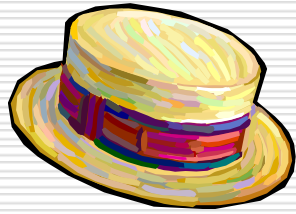
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### The Principle:

- ❑ If you need a board member, recruit a board member.
- ❑ If you need a volunteer, recruit a volunteer.



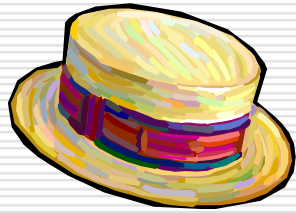
**“All of you, clothe yourselves with humility toward one another.” (1 Peter 5:5)**



## Balancing Board Roles

**Your  
Organizational  
Chart?**





## Balancing Board Roles

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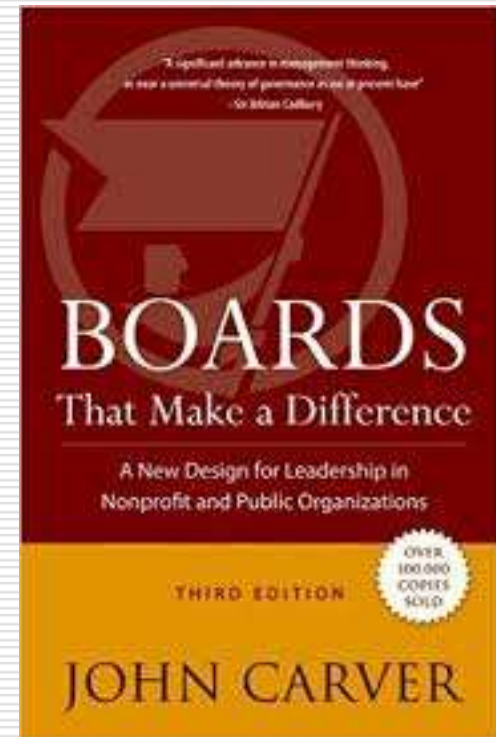
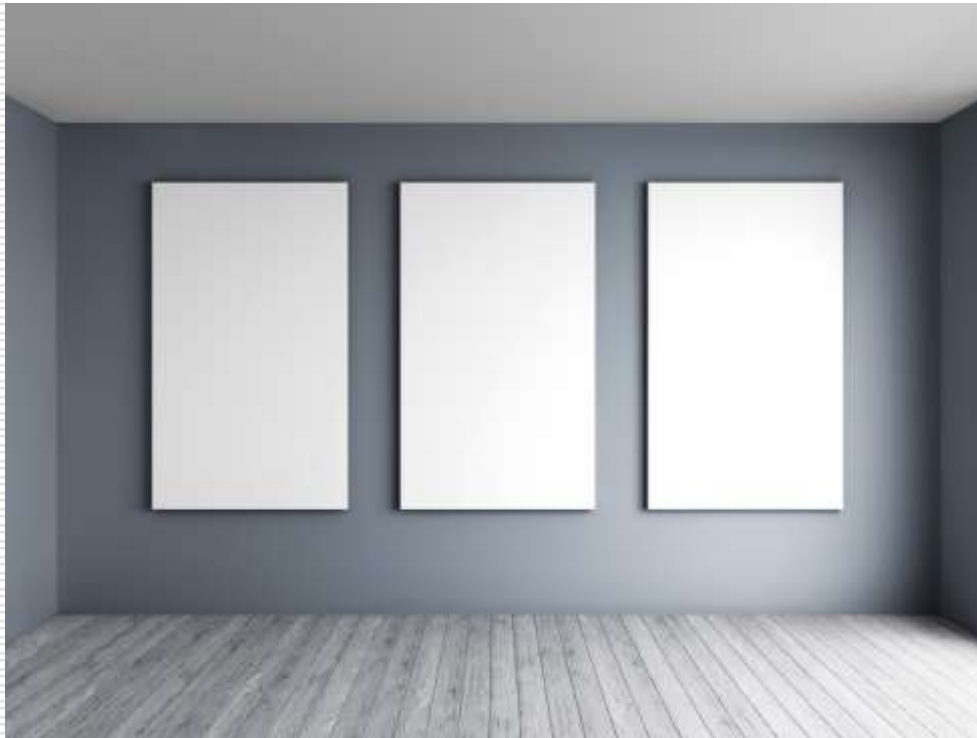
For a future discussion:  
Worksheet (p. 8):

**What hat are you  
wearing when...**

# #3. EXERCISE: The Continuum Between Policy Governance<sup>®</sup>...and Micro-Management

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□ See pages 9 and 10:



# WHERE IS YOUR BOARD ON THIS CONTINUUM?

p. 11

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Check the number that best describes your **BOARD's** operating style today:

High Policy-making.....High Hands-on

10	9	8	7	6	5	4	3	2	1
----	---	---	---	---	---	---	---	---	---

# WHERE IS YOUR CEO ON THIS CONTINUUM?

p. 11

---

Check the number that best describes your CEO's operating style today:

Proactive Leadership.....Reactive Leadership

10	9	8	7	6	5	4	3	2	1
----	---	---	---	---	---	---	---	---	---

# WHERE DO YOU WANT TO BE IN THE NEXT 12-18 MONTHS? (p. 12)

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## BOARD:

High Policy-making.....High Hands-on

10	9	8	7	6	5	4	3	2	1
----	---	---	---	---	---	---	---	---	---

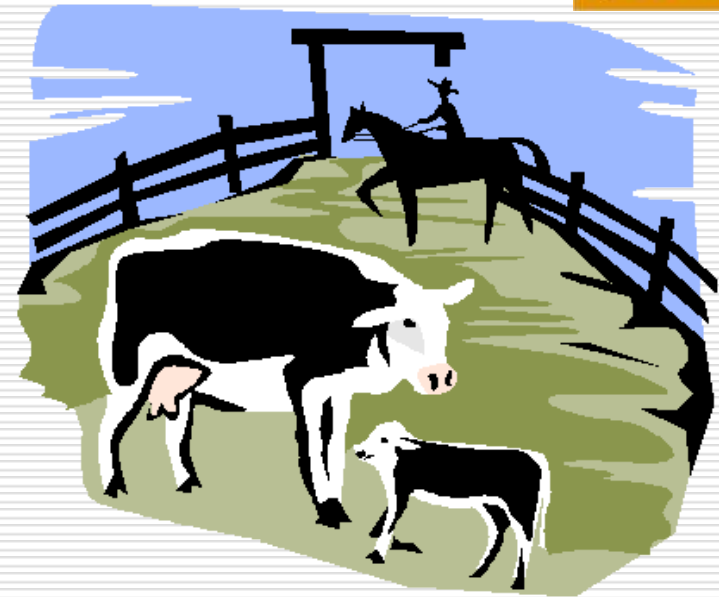
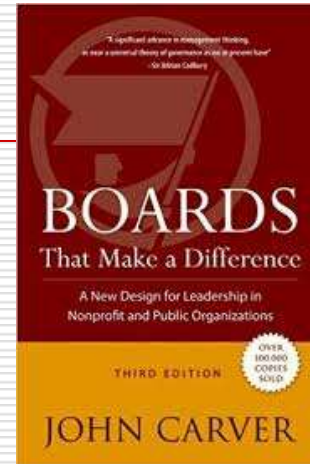
## CEO:

Proactive Leadership.....Reactive Leadership

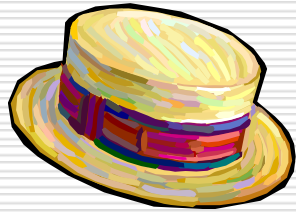
10	9	8	7	6	5	4	3	2	1
----	---	---	---	---	---	---	---	---	---



# #4. INSIGHT: What's all the fuss about Policy Governance®?



See Best Board Book #11 in the workbook (pages 75-76).



## Balancing Roles Board

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**#5. TOOL: (pages 14-21)\***

# Board Member Annual Affirmation Statement (Tool #21)



Download Word doc from:

***ECFA Tools & Templates for Effective Board Governance***  
(password to Word document in front of book)



# BALANCING BOARD AND CEO ROLES:

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#6. **TOOL:** (page 22)

## Prime Responsibility Chart (Tool #16)



# Prime Responsibility Chart – “Version 6”

*ECFA Tools & Templates book* (& p. 22 in workbook)

<b>AP</b> = Approval Required <b>P</b> = Prime Responsibility <b>A</b> = Assistant Responsibility	Board	Finance Comm.	<b>CEO</b>	CFO
<b>Budget Policies</b>	AP		P	A
<b>Non-budgeted expenditures under \$5,000</b>				AP
<b>Annual Budget</b>	AP	AP	A	P
<b>CEO Annual SMART Goals</b>	AP		P	
<b>CEO Performance Review</b>	P			



**Please stand!**

---

**Pop  
Quiz!**



# A Tool to Clarify the CEO's Top-5 Goals

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## #7. **BONUS** BEST PRACTICE!



## CEO's Monthly Dashboard Report (Tool #11)

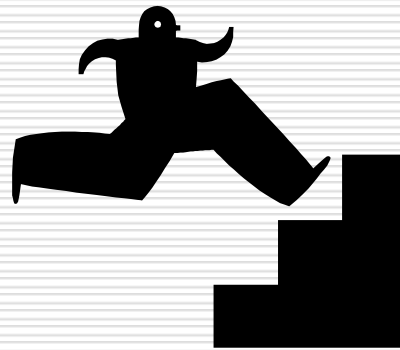


# Monthly Dashboard Report

<b>GOAL</b>	<b>TARGET DATE</b>	<b>3-MONTH UPDATE</b>
SMART Goal #1	12/31/2024	
SMART Goal #2	12/31/2024	
SMART Goal #3	9/30/2024	
SMART Goal #4	9/15/2024	

# **MISTAKE #1: Not Landing on the Appropriate Sweet Spot on the Continuum Between Policy Governance<sup>®</sup> ...and Micro-Management!**

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## **Next Steps & Take-Aways**

**p. 48**





# 10-Minute Break!

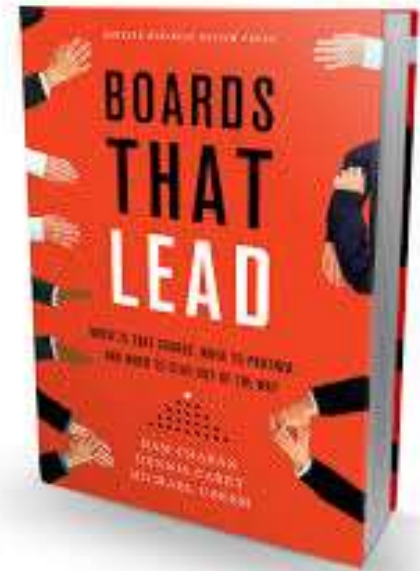
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□ **APPENDIX: BEST BOARD BOOKS #1 (p. 52)**

## **Boards That Lead**

*When to Take Charge,  
When to Partner, and  
When to Stay Out of the Way*

Ram Charan, Carey, & Useem



# THE 4 BIG MISTAKES TO AVOID WITH YOUR NONPROFIT BOARD

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## ❑ MISTAKE #2: Not Dating Board Prospects Before Proposing Marriage

*How to recruit and inspire the right people—with the right motives—to serve on your board, by focusing on the 4 phases of board recruitment.*



# Improving and Enriching the Board Experience by Focusing on Board Member Recruitment

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## The 4 Phases of Board Member Recruitment:

- Cultivation
- Recruitment
- Orientation
- Engagement

**Pages 24-31**

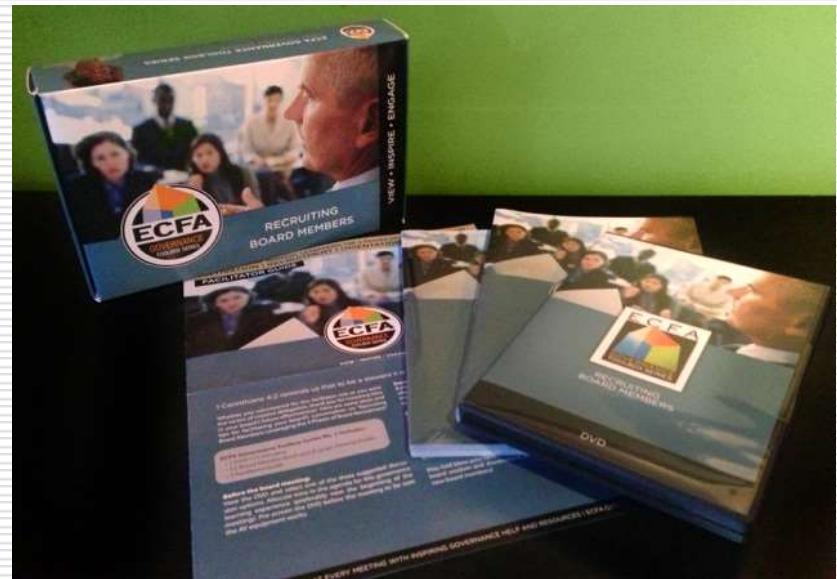
# THE VIDEO: Recruiting Board Members

<https://www.ecfa.org/ToolboxSeries.aspx>

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## In this session:

- The 4 phases of board recruitment and engagement
- 7 steps for recruiting board members



# Recruiting Board Members

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Worksheet: The 4 phases of board recruitment and engagement (p. 25):

- 1) Cultivation
- 2) Recruitment
- 3) Orientation
- 4) Engagement

How effective is your board?

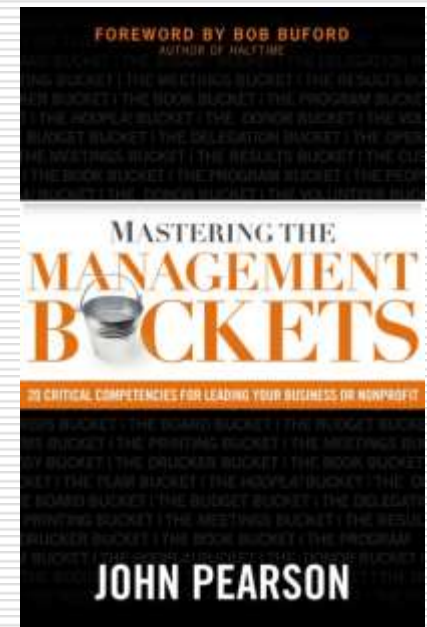
# Recruiting Board Members

From: *The Board Bucket* chapter (see workbook, pages 27-31)

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## 7 Steps for Recruiting Board Members:

1) Recruit for passion—not position.



# Recruiting Board Members

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## **7 Steps for Recruiting Board Members:**

- 1) Recruit for passion—not position.
- 2) Pray before prospecting.**

Recruit with *prayerful* intentionality and board-approved criteria. (**workbook, p. 27**)

The <b>6 D's</b> :	<b>HANK</b>	<b>JOAN</b>
1) <b>D</b> iscerning Decision-Maker: Policy, Financial, Hire/Fire CEO	✓	✓
2) <b>D</b> emonstrated passion for the mission	✓	✓
3) <b>D</b> ocumented team player	✓	✓
4) <b>D</b> iligent and faithful participant	✓	✓
5) <b>D</b> oer (walks the talk)	✓	✓
6) <b>D</b> onor (#1, #2 or #3 giving priority)	<b>NO</b>	✓



# Recruiting Board Members

---

## **7 Steps for Recruiting Board Members:**

- 1) Recruit for passion—not position.
- 2) Pray before prospecting.
- 3) Date before proposing!**

# **Warning!** Resume-Builders Make Lousy Board Members!\*

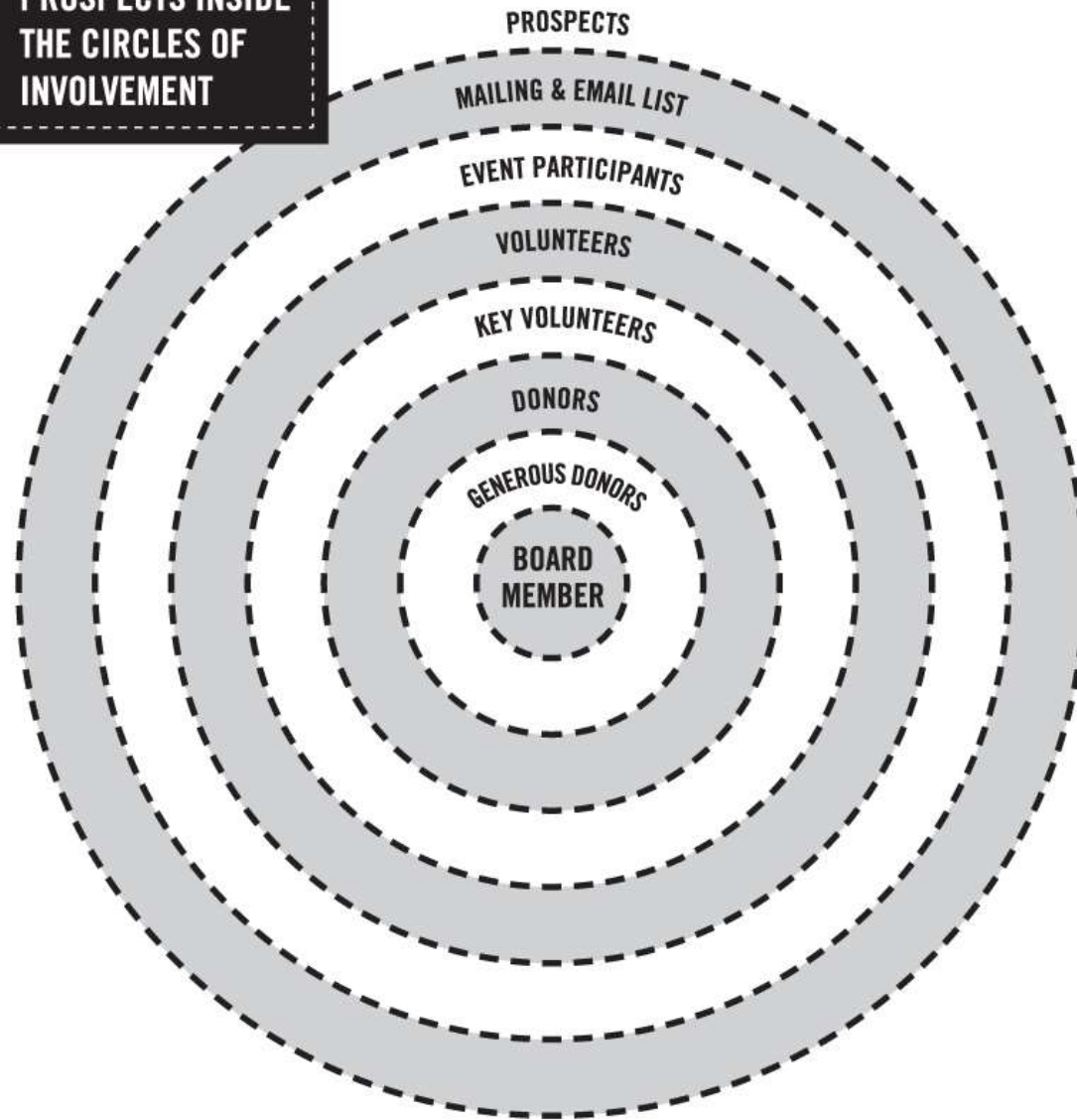
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**The  
empty  
parking lot  
should  
have been  
a clue!**



**BRINGING BOARD  
PROSPECTS INSIDE  
THE CIRCLES OF  
INVOLVEMENT**

**See  
page 28**



# Recruiting Board Members

---

## **7 Steps for Recruiting Board Members:**

- 1) Recruit for passion—not position.
- 2) Pray before prospecting.
- 3) Date before proposing!
- 4) Inspire your prospect to give generously.**

# Recruiting Board Members

---

## 7 Steps for Recruiting Board Members:

- 1) Recruit for passion—not position.
- 2) Pray before prospecting.
- 3) Date before proposing!
- 4) Inspire your prospect to give generously.

### 5) Propose marriage

→ See TOOL #3: “Board Nominee Orientation Binder Table of Contents”  
—a 31-tab recruitment tool

***ECFA Tools & Templates  
for Effective Board Governance***



# Recruiting Board Members

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## **7 Steps for Recruiting Board Members:**

- 1) Recruit for passion—not position.
- 2) Pray before prospecting.
- 3) Date before proposing!
- 4) Inspire your prospect to give generously.
- 5) Propose marriage.
- 6) Continue dating.** (“Ten Minutes for Governance” at every meeting.)

# Recruiting Board Members

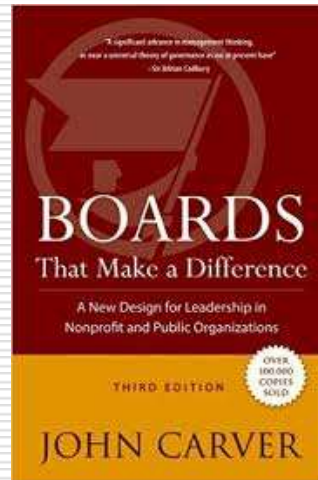
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## **7 Steps for Recruiting Board Members:**

- 1) Recruit for passion—not position.
- 2) Pray before prospecting.
- 3) Date before proposing!
- 4) Inspire your prospect to give generously.
- 5) Propose marriage.
- 6) Continue dating.
- 7) **Leave a legacy (2 Timothy 2:2)**

# P.S. Astute board prospects will ask you about “**Policy Governance**®”

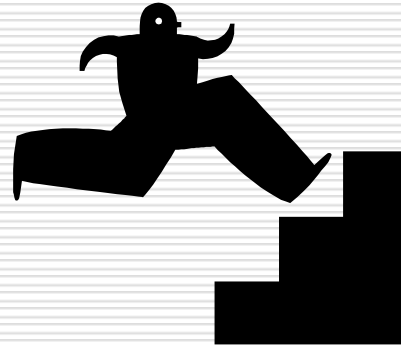
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# **MISTAKE #2: Not Dating Board Prospects Before Proposing Marriage**

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## **Next Steps & Take-Aways**

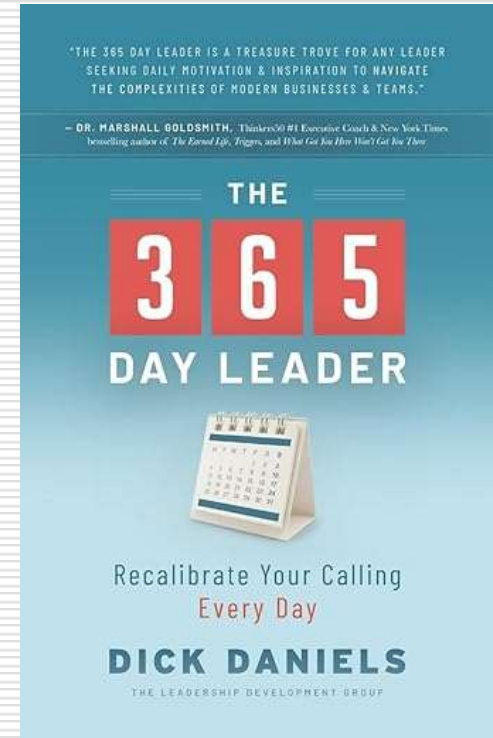
p. 48



# 10-Minute Break!

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## ***The 365 Day Leader: Recalibrate Your Calling Every Day***



[https://urgentink.typepad.com/my\\_weblog/2024/07/the-365-day-leader-recalibrate-your-calling-every-day.html](https://urgentink.typepad.com/my_weblog/2024/07/the-365-day-leader-recalibrate-your-calling-every-day.html)

# “A Board Prayer” by Dan Bolin

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Coming Fall 2024!

# THE 4 BIG MISTAKES TO AVOID WITH YOUR NONPROFIT BOARD

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## ❑ **MISTAKE #3:** Not Leveraging God-given Gifts and Passion

*How to leverage the **3 Powerful S's** of your board members and CEO—**S**piritual Gifts, **S**ocial Styles, and **S**trengths.*



# Leveraging the **3 Powerful S's** of Your Board Members and CEO:

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**Spiritual Gifts**

**Strengths**

**Social Styles**

**King David:** “We are fearfully and wonderfully made.”

p. 34

**Please stand!**

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**Pop  
Quiz!**



## ▲ 3 Big Ideas (page 34)

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### The 3 Powerful S's

**S**piritual Gifts

**S**trengths

**S**ocial Styles

## ▲ *Tom Rath* ▲

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“...our studies indicate that people who do have the opportunity to focus on their strengths every day are six times as likely to be engaged in their jobs and more than three times as likely to report having an excellent quality of life in general.”



Invest in strengths...and you'll have more time to invest in **opportunities** vs. fire-fighting.

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“An organization will have a high spirit of performance if it is consistently directed toward opportunity rather than toward problems.”

Leader  
to Leader  
INSTITUTE

Peter F. Drucker

# The 3 Powerful S's

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□ **S**piritual Gifts

➔ **S**trengths

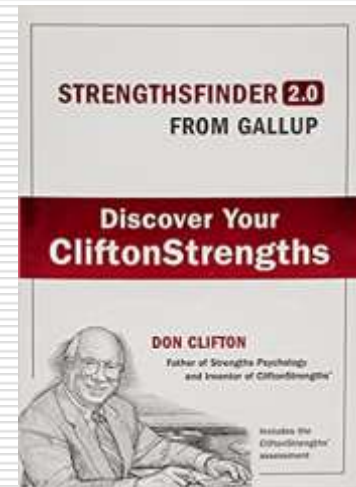
□ **S**ocial Styles

# StrengthsFinder (p. 35)

## Tool #20: *Tent Cards and Tools...* ➔



- ❑ **75%** of us don't leverage our strengths—because either we don't know our strengths, or our colleagues don't know them!
- ❑ There are 34 “talent themes”
- ❑ The online assessment identifies your Top-5
- ❑ The Big Idea: **We must leverage the strengths** God gave **Andy** and minimize his weaknesses.
- ❑ More information at:  
[www.gallup.com/cliftonstrengths](http://www.gallup.com/cliftonstrengths)



EXECUTING	INFLUENCING	RELATIONSHIP BUILDING	STRATEGIC THINKING
Achiever	Activator	Adaptability	Analytical
Arranger	Command	Connectedness	Context
Belief	Communication	Developer	Futuristic
Consistency	Competition	Empathy	Ideation
Deliberative	Maximizer	Harmony	Input
Discipline	Self-Assurance	Includer	Intellection
Focus	Significance	Individualization	Learner
Responsibility	Woo	Positivity	Strategic
Restorative		Relator	

EXECUTING	INFLUENCING	RELATIONSHIP BUILDING	STRATEGIC THINKING
Achiever	Activator	Adaptability	Analytical
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Deliberative	Maximizer	Harmony	Input
Discipline	Self-Assurance	Includer	Intellection
Focus	Significance	Individualization	Learner
Responsibility	Woo	Positivity	Strategic
Restorative		Relator	<b>MIKE</b>

EXECUTING	INFLUENCING	RELATIONSHIP BUILDING	STRATEGIC THINKING
<b>Achiever</b>	<b>Activator</b>	Adaptability	Analytical
Arranger	Command	Connectedness	Context
Belief	Communication	Developer	Futuristic
Consistency	<b>Competition</b>	Empathy	Ideation
Deliberative	Maximizer	Harmony	Input
Discipline	<b>Self-Assurance</b>	Includer	Intellection
Focus	Significance	Individualization	Learner
<b>Responsibility</b>	Woo	Positivity	Strategic
Restorative		<b>Relator</b>	<b>JIM WEST</b>

EXECUTING	INFLUENCING	RELATIONSHIP BUILDING	STRATEGIC THINKING
<b>Achiever</b>	Activator	Adaptability	Analytical
Arranger	Command	Connectedness	Context
<b>Belief</b>	Communication	Developer	Futuristic
Consistency	Competition	Empathy	Ideation
Deliberative	Maximizer	Harmony	Input
Discipline	Self-Assurance	Includer	Intellection
<b>Focus</b>	Significance	Individualization	Learner
<b>Responsibility</b>	Woo	Positivity	Strategic
<b>Restorative</b>		Relator	<b>How would you work with JVD?</b>

EXECUTING	INFLUENCING	RELATIONSHIP BUILDING	STRATEGIC THINKING
<b>Achiever</b>	Activator	Adaptability	Analytical
Arranger	Command	Connectedness	Context
<b>Belief</b>	Communication	Developer	Futuristic
Consistency	Competition	Empathy	Ideation
Deliberative	Maximizer	Harmony	Input
Discipline	Self-Assurance	Includer	Intellection
Focus	Significance	Individualization	Learner
<b>Responsibility</b>	Woo	Positivity	<b>Strategic</b>
Restorative		<b>Relator</b>	<b>How would you work with Todd?</b>



EXECUTING	INFLUENCING	RELATIONSHIP BUILDING	STRATEGIC THINKING
Achiever	Activator	Adaptability	Analytical
Arranger	Command	Connectedness	Context
<b>Belief</b>	Communication	Developer	Futuristic
Consistency	Competition	Empathy	Ideation
Deliberative	<b>Maximizer</b>	Harmony	Input
Discipline	Self-Assurance	<b>Includer</b>	Intellection
Focus	Significance	<b>Individualization</b>	Learner
Responsibility	<b>Woo</b>	Positivity	Strategic
Restorative		Relator	<b>U.I. MGT TEAM #1 STRENGTHS</b>

# 4 StrengthsFinder Tools

## Tool #1: Tent Card

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- ❑ The chances of 2 people having the same Top 5 themes in any order is 1 in 278,256.
- ❑ The chances of 2 people having the same Top 5 themes in the same order is **1 in 33 million!**

<https://releasingstrengths.com/strengths-twins/>

Tool #2: SF Chart →

The 34 Themes of Talent	David Barton	Mark Bargaehr	Cathy Barrett	Rick Bee	Cheryl Gardner	Tom Matlock	Mike Pate	John Pearson	Dale Torry	John Walling
1st	Connectedness	Achiever	Communication	Strategic	Responsibility	Ideation	Communication	Focus	Ideation	Activator
2nd	Empathy	Responsibility	Achiever	Positivity	Input	Strategic	Strategic	Responsibility	Maximizer	Ideation
3rd	Discipline	Positivity	Woo	Activator	Achiever	Intellecion	Positivity	Significance	Futuristic	Individualization
4th	Individualization	Significance	Consistency	Woo	Context	Connectedness	Futuristic	Belief	Strategic	Amanger
5th	Relator	Analytical	Connectedness	Communication	Significance	Adeptability	Activator	Maximizer	Belief	Significance
<b>EXECUTING</b>										
Achiever		Achiever	Achiever		Achiever					
Arranger										Amanger
Belief								Belief	Belief	
Consistency			Consistency							
Deliberative										
Discipline	Discipline									
Focus								Focus		
Responsibility		Responsibility			Responsibility			Responsibility		
Restorative										
<b>INFLUENCING</b>										
Activator				Activator			Activator			Activator
Command										
Communication			Communication	Communication			Communication			
Competition										
Maximizer								Maximizer	Maximizer	
Self-Assurance										
Significance		Significance			Significance			Significance		Significance
Woo			Woo	Woo						
<b>RELATIONSHIP BUILDING</b>										
Adaptability						Adeptability				
Connectedness	Connectedness		Connectedness			Connectedness				
Developer										
Empathy	Empathy									
Harmony										
Includer										
Individualization	Individualization									Individualization
Positivity		Positivity		Positivity			Positivity			
Relator	Relator									
<b>STRATEGIC THINKING</b>										
Analytical		Analytical								
Context					Context					
Futuristic							Futuristic		Futuristic	
Ideation						Ideation			Ideation	Ideation
Input					Input					
Intellecion						Intellecion				
Learner										
Strategic				Strategic		Strategic	Strategic		Strategic	

Updated: 3/26/2018

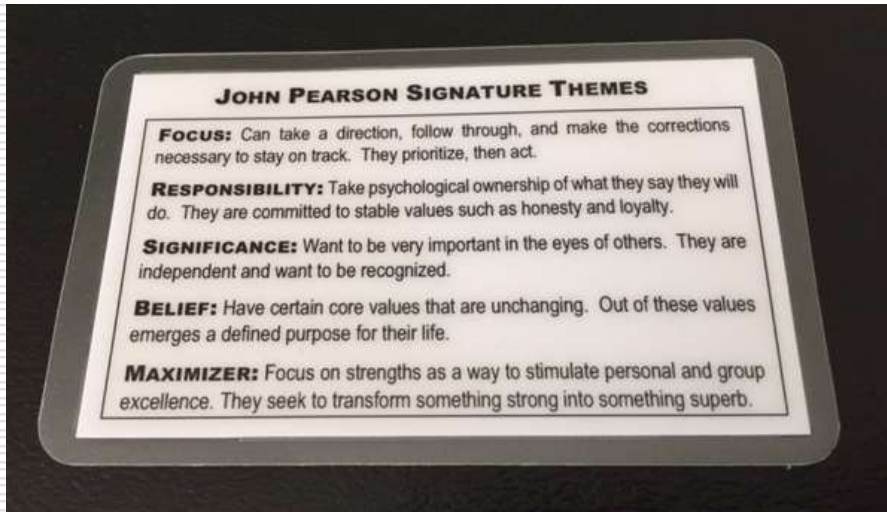
[www.galupstrengthscenter.com](http://www.galupstrengthscenter.com)

Chart Concept: John Pearson A

# StrengthsFinder

## Tools #3 and #4: Cards & Mugs!

---



<https://strengthsmugs.com/>

# 34 StrengthsFinder Videos:

<https://www.youtube.com/playlist?list=PLxDaK7wlyw9609RQulcVwcCtJ6j17hmO4>

---

**How Could Strengths Impact  
Your Work and Ministry?**



**Adaptability Video:**

<https://youtu.be/IMXasNLgfl8?list=PLxDaK7wlyw9609RQulcVwcCtJ6j17hmO4>



# The 3 Powerful S's

---

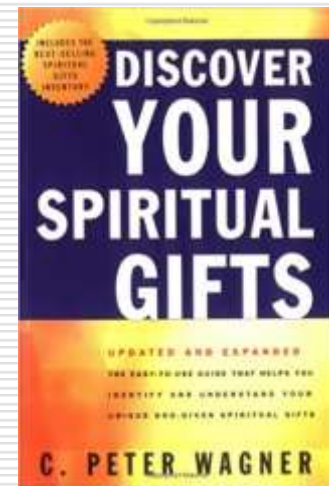
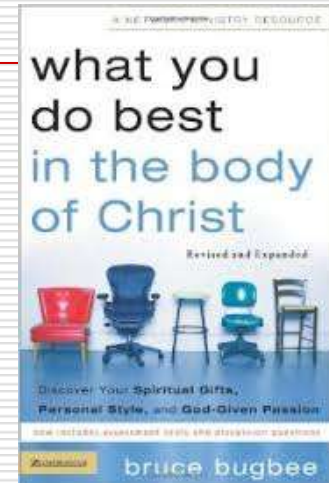
## → Spiritual Gifts

- Strengths
- Social Styles

## ▲ 2 books on spiritual gifts

---

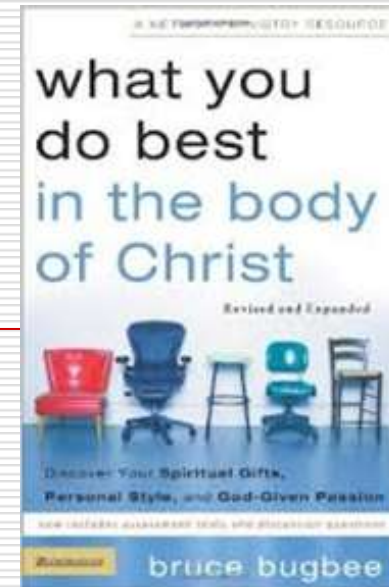
- **Option #1:** *What You Do Best in the Body of Christ: Discover Your Spiritual Gifts, Personal Style and God-Given Passion* (revised and expanded—with assessment tools and discussion questions), by Bruce Bugbee
- **Option #2:** *Discover Your Spiritual Gifts: The Easy-to-Use Guide That Helps You Identify and Understand Your Unique God-Given Spiritual Gifts* (includes the bestselling spiritual gifts inventory), by C. Peter Wagner.



# ▲ *Spiritual Gifts – Bugbee (p. 35)*

---

- Administration
- Craftsmanship
- Creative Communication
- Encouragement
- Faith
- Giving
- Helps
- Hospitality
- Intercession
- Leadership
- Mercy
- Apostleship
- Prophecy
- Evangelism
- Shepherding
- Teaching
- Discernment
- Word of Knowledge
- Word of Wisdom
- Healing
- Interpretation
- Miracles
- Tongues





**▲ Discuss! ▲**

---

## **How Could Spiritual Gifts Impact Your Work and Ministry?**



# The 3 Powerful S's

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## ➔ Social Styles (p.36-37)

<https://tracom.com/social-style-training/model>

- ☐ Strengths
- ☐ Spiritual Gifts

Video:

<https://youtu.be/wRBx8IkV-kQ>

## #7. The People Bucket Core Competency

**We celebrate the God-designed uniqueness of our team members, our customers, our donors, and our volunteers. We are diligent about understanding the four social styles—Analyticals, Drivers, Amiables and Expressives—and helping our people find their comfort zones as they grow in their interpersonal versatility skills.**



# The People Bucket Ball #1

**Know  
Your Own  
Social Style**

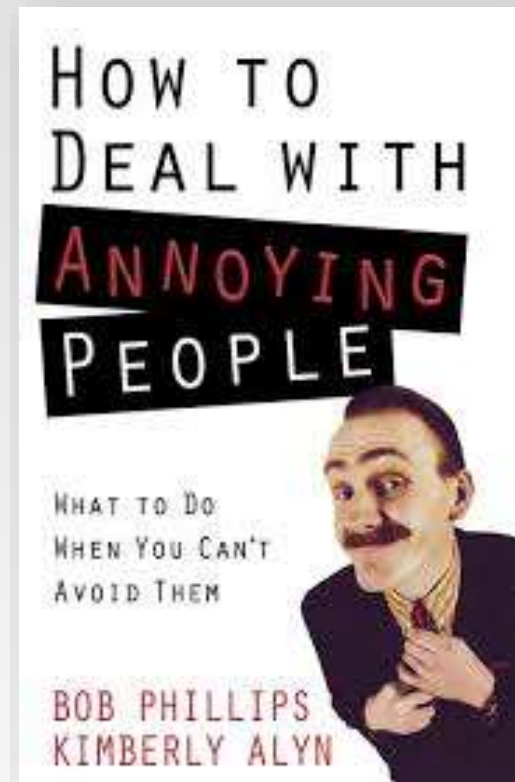
**Find your comfort zone and  
help others feel comfortable.**



# The 4 Social Styles

## *How to Deal With Annoying People*

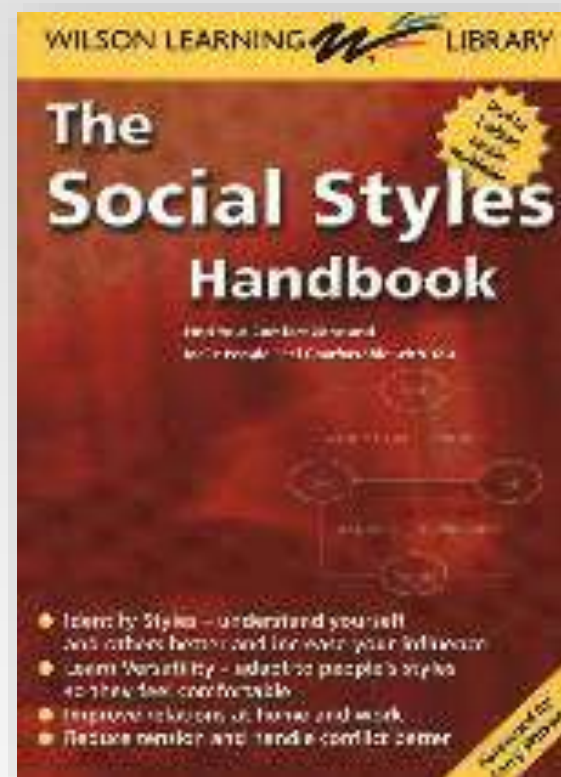
Bob Phillips



# The 4 Social Styles

## The Classic:

# *The Social Styles Handbook*





# The People Bucket Ball #1

**Know Your Social Style:  
Effective Leaders Are  
Versatile!**

**This is a  
BIG idea!**

**“Treating people the way WE want  
to be treated can be wrong 75  
percent of the time, and right only  
25 percent!” (Larry Wilson)**



# Assertiveness





# Responsiveness

**CONTROL**  
*Tasks & Facts*

**Ask**  
**Slow**

**Tell**  
**Fast**

**EMOTE**  
**Feelings & Intuition**

# The 4 Social Styles

<b>Analyticals</b>	<b>Drivers</b>
<b>Amiables</b>	<b><i>Expressives!!!!</i></b>

***Priority*** in common  
(Control - Emote)

**Analyticals**

**Drivers**

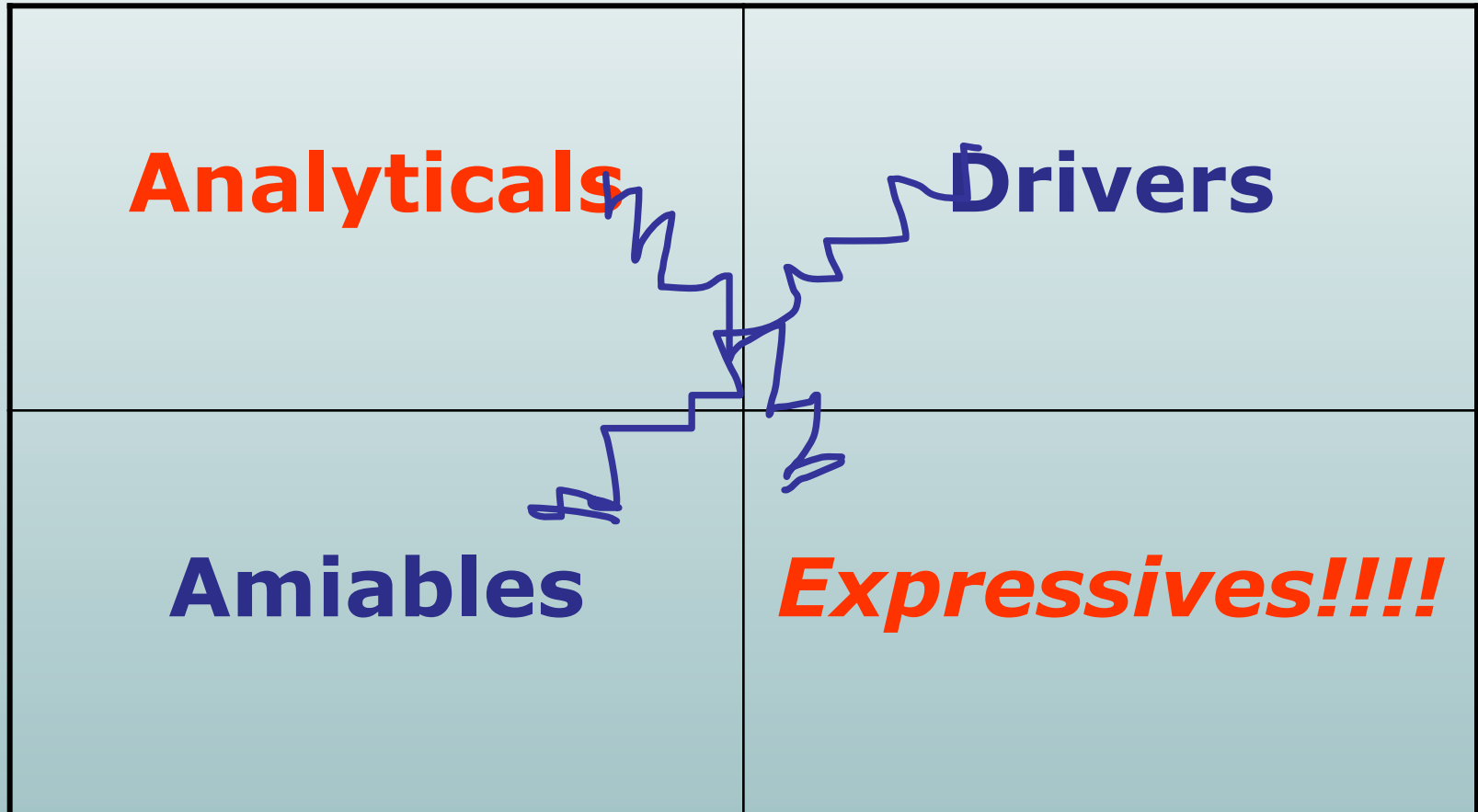
**Amiables**

***Expressives!!!!***

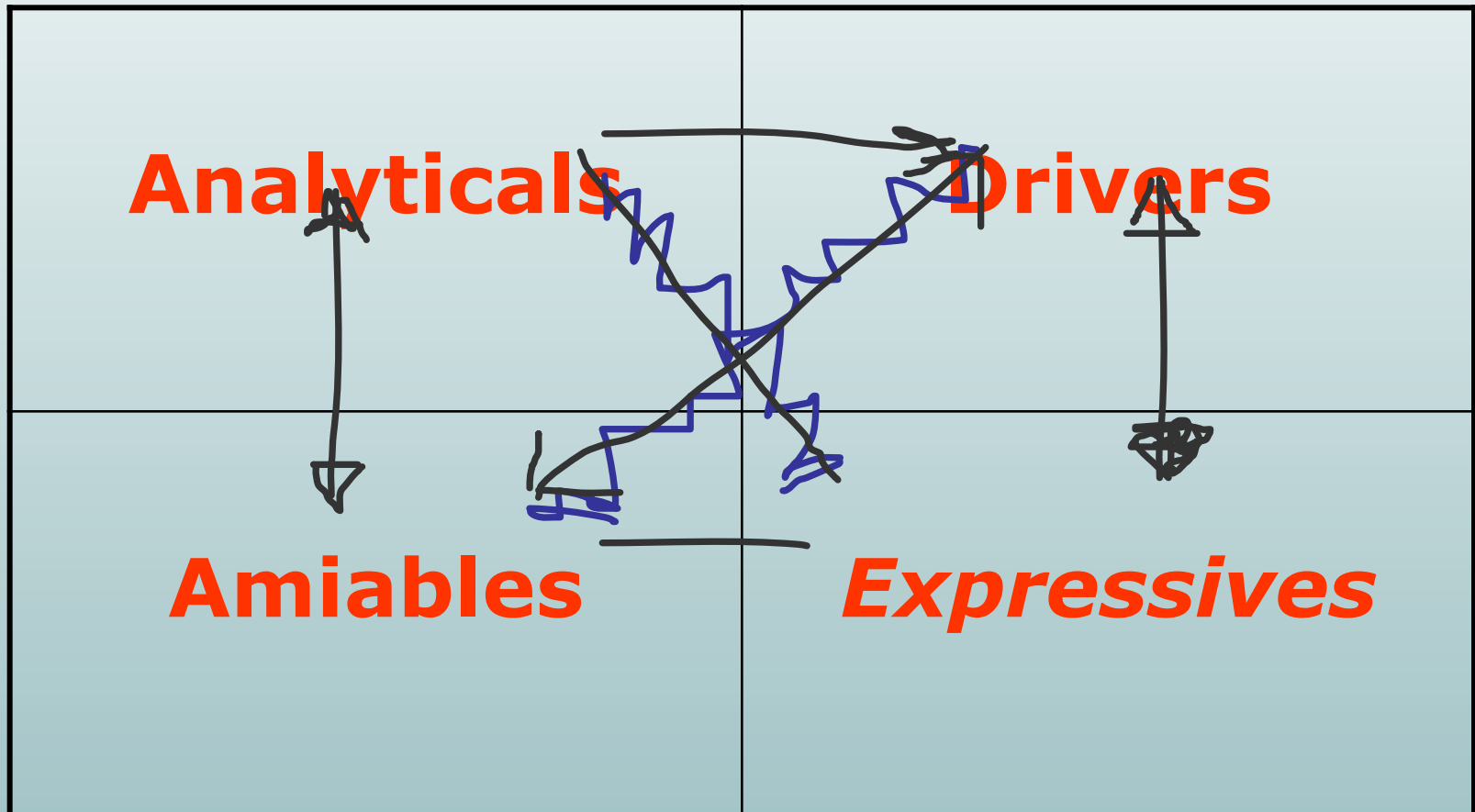
# ***Pace*** in common (Slow - Fast)

<b>Analyticals</b>	<b>Drivers</b>
<b>Amiables</b>	<b><i>Expressives!!!!</i></b>

**Yikes!** Nothing in common!



**Versatility is the key!**  
*And...understand "back-up" styles.*





# The People Bucket Ball #2

**Communicate creatively to  
all 4 social styles:**

- **Donors**
- **Board Members**
- **Interviews**
- **Team Members** (chart them)
- **Family**
- **Customers**
- **Congregations**



# 6 TIPS ANALYTICAL STYLE

## How to Work with Analytical Style People

1 take your  
**TIME**

2 **COMMUNICATE**  
clearly & concisely

3 **DON'T PRESSURE**  
for answers

4 **RESPECT**  
their processes

5 ask directly for their  
**FEEDBACK**

6 give them  
**SPACE**



**TRACOM GROUP**  
THE CREATOR OF SOCIAL STYLE®

[www.socialstyle.com](http://www.socialstyle.com)



# 6 TIPS DRIVING STYLE

How to Work with Driving Style People

1

**RESPECT**  
their time

4

show your  
**COMPETENCE**

2

**STICK TO**  
the facts

5

**EARN THEIR TRUST**  
before expecting it

3

follow up on your  
**PROMISES**

6

let them have some  
**CONTROL**



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[www.socialstyle.com](http://www.socialstyle.com)

# 6 TIPS AMIABLE STYLE

How to Work with Amiable Style People

1 **APPROACH**  
conflict carefully

4 draw out their  
**OPINIONS**

2 **GET TO**  
know them

5 handle issues in  
**PRIVATE**

3 consider their  
**PERSPECTIVES**

6 always be  
**COURTEOUS**



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# 6 TIPS EXPRESSIVE STYLE

How to Work with Expressive Style People

**1** **LAUGH**  
with them

**2** **LISTEN**  
to their opinions

**3** **THINK BIG**  
picture

**4** **RECOGNIZE**  
their contributions

**5** **LIGHTEN**  
**UP**

**6** form a  
**FRIENDSHIP**



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# Social Style: *Easier to learn and remember!*

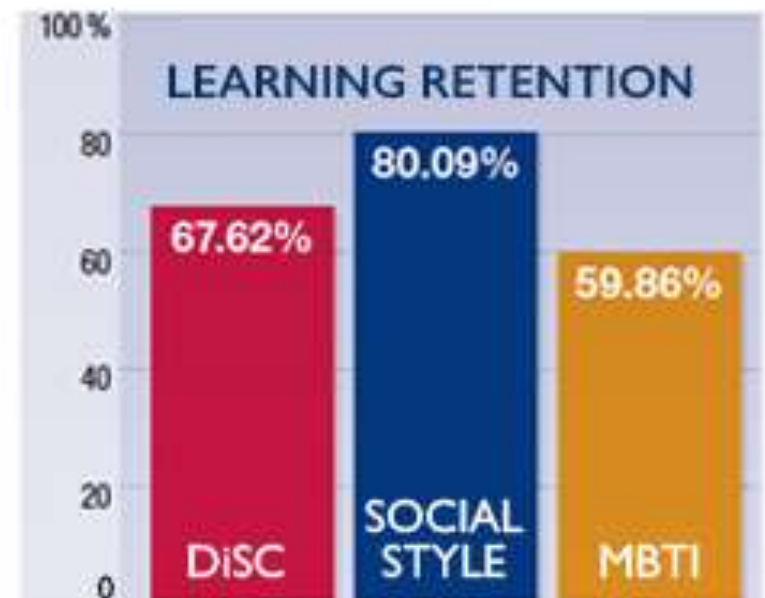
<https://tracom.com/social-style-training/model>

**SOCIAL STYLE —  
easier to learn & apply  
than DiSC or MBTI?**

**NOT JUST EASIER. MUCH EASIER.**

SOCIAL STYLE learning retention  
trumps MBTI by 34% and DiSC by 18%.

**SEE THE COLORADO STATE  
UNIVERSITY STUDY HERE**



**▲ Discuss! ▲**

---

## **How Could Social Styles Impact Your Work and Ministry?**



# Imagine the **joy**...when you leverage all **3** Powerful **S**'s!

---

“Why are you doing what others can do, when you are leaving undone what only you can do?”

Bruce Bugbee in *What You Do Best in the Body of Christ*



**Read:**

## Chapter 7: The People Bucket (Social Styles) Chapter 9: The Team Bucket (Strengths)

---

**ManagementBuckets.com**

**Your Weekly Staff Meeting eNews:**  
*a book and a bucket every issue*



# The 4 Social Styles in the Boardroom

**Video:** 10.5 minutes

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[https://www.youtube.com/watch?v=Y8\\_5YmFiEhw](https://www.youtube.com/watch?v=Y8_5YmFiEhw)

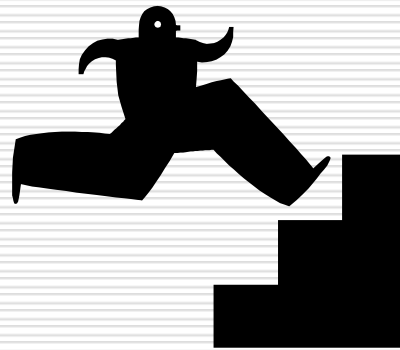


The 4 Social Styles in the Boardroom John Pearson 2020



# **MISTAKE #3: Not Leveraging God-given Gifts and Passion**

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## **Next Steps & Take-Aways**

p. 48



# 10-Minute Break!

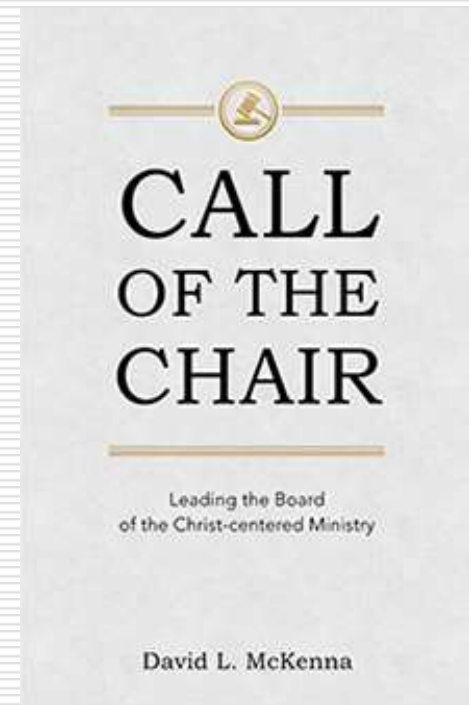
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□ **APPENDIX: BEST BOARD BOOKS #12 (p. 77)**

## **Call of the Chair**

*Leading the Board of the  
Christ-centered Ministry*

David L. McKenna

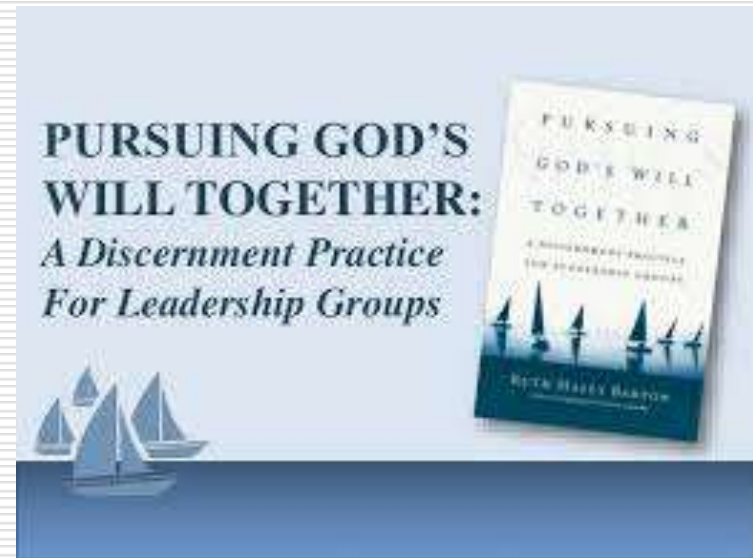


# THE 4 BIG MISTAKES TO AVOID WITH YOUR NONPROFIT BOARD

---

## ❑ MISTAKE #4: Not Articulating and *Owning* the Ministry Strategy

*How to discern God's voice about your ministry's future—  
with a 3-Year Rolling Strategic Plan and a strategy that is *owned* by the board.*



# David Schmidt: *Wise Planning*

---



<https://wiseplanning.net/>

# Did your strategic plan imagine this?

## November 9, 2016

---



# Did your strategic plan imagine this?

## November 8, 2020

---



# Did your strategic plan imagine this?

## July 21, 2024

---



# Strategic Planning

## Does Your Board Own the Strategy? (p. 40-45)

---

### Focusing on the Future vs. Micromanaging the Present

*Big Ideas,  
Tools, & Templates*





# Does Your Board Own the Strategy?

---

- How do we inspire the board to focus on its two most critical jobs:
  - hiring and encouraging the CEO
  - and owning (but not micro-managing) the organization's strategy?

## Focusing Versus Micro-managing

---

### KEY PRINCIPLE:

→ The Best Boards Build Strategic Planning Into Their Organization's DNA

# Focusing Versus Micro-managing

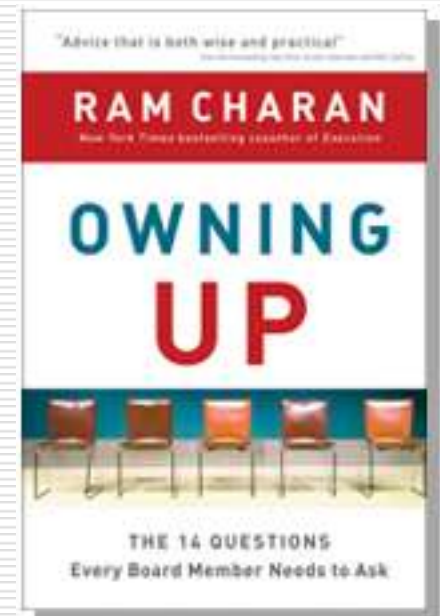
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## #1. The Best Boards Own the Strategy (p. 40-41)

**“There is nothing more important for a CEO than having the right strategy and right choice of goals, and for the board, the right strategy is second only to having the right CEO.”**

➔ Chapter 5 recommendations:  
2-page strategy document

Book #5  
(p. 60)  
↓



# Did Target's Board OWN the strategy? January 16, 2015



[http://online.wsj.com/articles/target-to-exit-canada-1421328919?reflink=desktopwebshare\\_permalink](http://online.wsj.com/articles/target-to-exit-canada-1421328919?reflink=desktopwebshare_permalink)

[http://www.wsj.com/articles/technology-bubble-ask-waffle-house-1424754062?reflink=desktopwebshare\\_permalink](http://www.wsj.com/articles/technology-bubble-ask-waffle-house-1424754062?reflink=desktopwebshare_permalink)

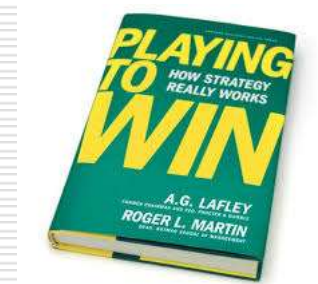
## The Best Boards Own the Strategy

### What do we mean by “strategy?”

- ❑ Retail or wholesale? Where to play?
- ❑ *HBR* article: “What Is Strategy?”

[http://urgentink.typepad.com/my\\_weblog/2013/06/what-is-strategy.html](http://urgentink.typepad.com/my_weblog/2013/06/what-is-strategy.html)

- ❑ *HBR*: “The Big Lie of Strategic Planning”
- ❑ Book: *Playing to Win*



# Bounty asked the customer!

[https://urgentink.typepad.com/my\\_weblog/2015/12/playing-to-win-how-strategy-really-works.html](https://urgentink.typepad.com/my_weblog/2015/12/playing-to-win-how-strategy-really-works.html)

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The Bounty team identified three distinct types of paper towel users:

**Group 1** cared about “both strength and absorbency.”

**Group 2** wanted “a paper towel with a cloth-like feel.”

**Group 3** had “price as their top priority, though not as their sole concern.”

Based on consumer research, Bounty decided to serve all three segments with the development of two new products. So at stores across North America today, you’ll find at least three choices:

- **Bounty**
- **Bounty Extra Soft**
- **Bounty Basic**

P.S. Bounty Basic is stocked on shelves far away from the traditional Bounty!



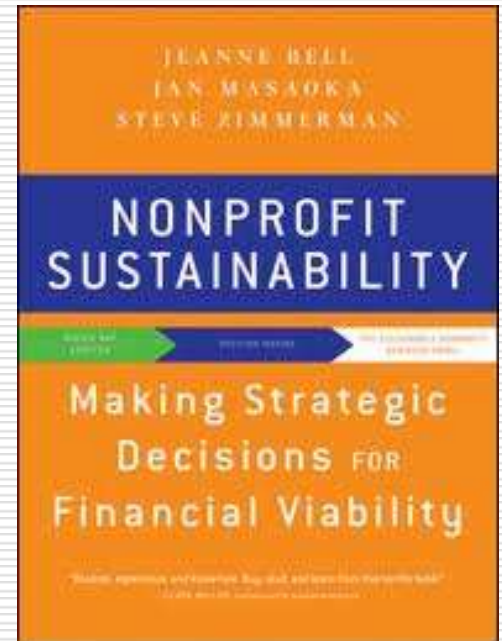
# Focusing Versus Micro-managing

p. 42

## #2. The Best Boards





### Focus on Sustainability

Making strategic decisions for financial viability



- ◆ See chart on page 25 in *Nonprofit Sustainability* (workbook, p. 42➡).
- ◆ See Best Board Book #13 (workbook, p. 80-82)

# Nonprofit Sustainability (p.42)

<p><b>High Mission Impact Low Sustainability</b></p>	<p><b>High Mission Impact High Sustainability</b></p>
	
<p><b>Low Mission Impact Low Sustainability</b></p>	<p><b>Low Mission Impact High Sustainability</b></p>
	



my opinion:

---

## **#3. The Best Boards Use a...**

# **Rolling 3-Year Strategic Planning Process**

**...and Systemically Look Ahead  
Every Year**

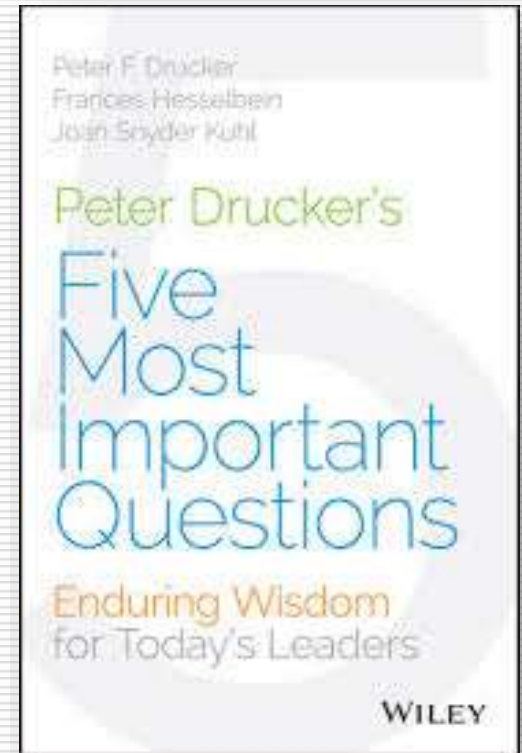
p. 43-44

# Strategic Planning Tools & Templates:

---

1. **Begin with mission and customer.**
2. **Plan a spiritual discernment process.\***
3. **Discern a bold target with a BHAG.**
  - **Big *HOLY* Audacious Goal**

*\*Pursuing God's Will Together & Strengthening the Soul of Your Leadership,*  
by Ruth Haley Barton



# Strategic Planning Tools & Templates:

## *Tools & Templates for Effective Board Governance*

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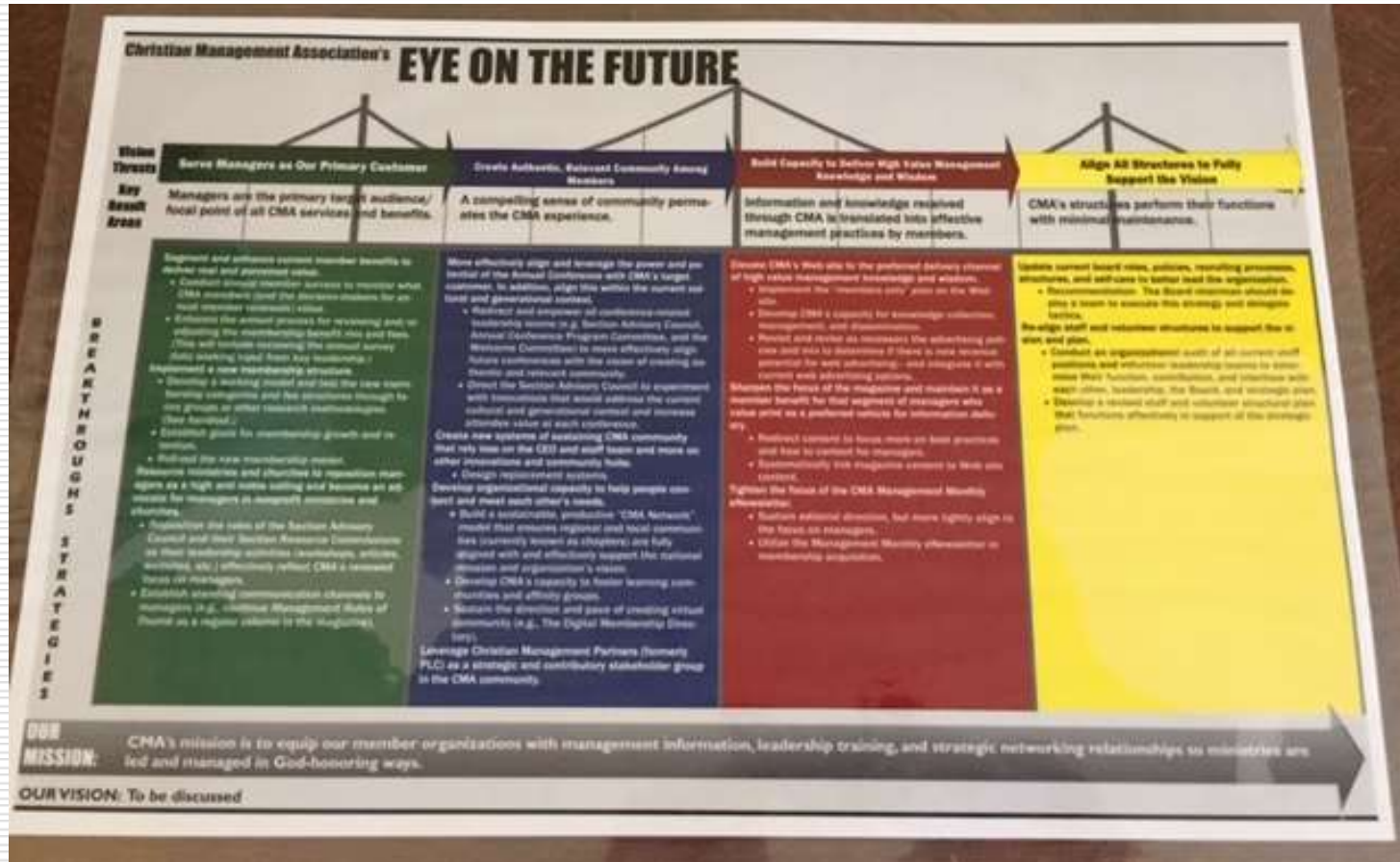
### 4. Summarize with a “Strategic Plan Placemat”

<b>3-5 Visionary Priorities:</b>	<b>2024</b>	<b>2025</b>	<b>2026</b>	<b>By Fall 2024, add: 2027</b>
<b>SMART Goal #1</b>				
<b>SMART Goal #2</b>				
<b>SMART Goal #3</b>				
<b>SMART Goal #4</b>				
<b>SMART Goal #5</b>				

**Drucker: “If you have more than 5 goals, you have none.”**

# Wise Planning's "Strategic Plan Placemat"

CMA is now CLA - <https://christianleadershipalliance.org/>



## ONE MISSION, MANY MINISTRIES

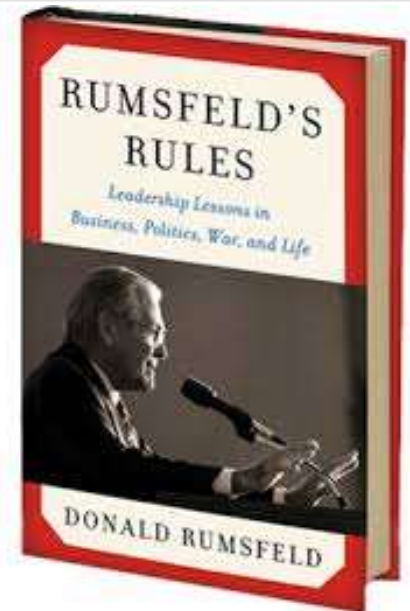
The Rolling 3-Year Strategic Plan • 2014 to 2017

<b>MISSION</b>	<b>EMBRACING PEOPLE WITH THE COMPASSION OF CHRIST</b>
<b>VISION</b>	<b>TRANSFORMING LIVES BY TRANSFORMING THE HEARTS OF THOSE WE ENCOUNTER</b>
<b>ACTION</b>	<b>RELATING WITH RESPECT TO REDEEM AND RESTORE</b>
<b>BHAG</b>	OUR BIG HOLY AUDACIOUS GOAL: BY JUNE 30, 2019 <b>Decentralize Skid Row by expanding services in outlying communities while measuring and sharing the outcomes of our life transforming work.</b>

	<b>Year 1: FY15</b> <b>July 1, 2014 – June 30, 2015</b>	<b>Year 2: FY16</b> <b>July 1, 2015 – June 30, 2016</b>	<b>Year 3: FY17</b> <b>July 1, 2016 – June 30, 2017</b>
<b>GOAL #1</b> • <b>Build Our Team</b>	By June 30, 2015: <ul style="list-style-type: none"> <li>Finalize Market compensation analysis</li> <li>Offer 3 leadership training courses to managers (AGBIE, succession plan)</li> <li>Complete staff survey</li> <li>Theme verse for the year: Phil 4:8</li> </ul>	By June 30, 2016: <ul style="list-style-type: none"> <li>Reduce merit increase up to 2%</li> <li>Increase 401k match to 4%</li> <li>Offer 3 leadership training courses to managers</li> <li>Reduce turnover by 10%</li> </ul>	By June 30, 2017: <ul style="list-style-type: none"> <li>Reduce merit increase up to 2%</li> <li>Increase 401k match to 5%</li> <li>Offer 3 leadership training courses to managers</li> </ul>
<b>GOAL #2</b> • <b>Build Our Programs</b>	By June 30, 2015 unless otherwise noted: <ul style="list-style-type: none"> <li>Reach 80% occupancy at HG by October 31, 2014</li> <li>Investigate long-term restorative housing at HQ</li> <li>Open Thrift Store</li> <li>Add interns to meet with guests in day rooms</li> <li>Partner with Bible to measure life transformation</li> <li>Expand guest surveys and perform by 1/31/2015</li> <li>Investigate offsite men's recovery program</li> </ul>	By June 30, 2016 unless otherwise noted: <ul style="list-style-type: none"> <li>Reduce lease payments to program production cost</li> <li>Add Chaplains to meet with guests in day rooms</li> <li>Start women's recovery program</li> <li>Identify location for 2<sup>nd</sup> Thrift Store and Production Center</li> <li>Utilize Bible results to improve life transformation by implementing recommendations</li> <li>Explore transitional program for youth 16-25</li> <li>Continue to investigate offsite men's recovery program</li> </ul>	By June 30, 2017 unless otherwise noted: <ul style="list-style-type: none"> <li>Implement offsite men's recovery program</li> <li>Open second Thrift Store by Jan 1, 2017</li> </ul>
<b>GOAL #3</b> • <b>Build Our Network</b>	By June 30, 2015: <ul style="list-style-type: none"> <li>Add 1 church partnership modeled after Pacific Coast</li> <li>Increase weekly/monthly repeat volunteers by 2%</li> <li>Establish program to engage neighborhoods producing greatest number of those experiencing homelessness</li> <li>Build reserves to 3 months</li> <li>Begin Phase I of Capital Campaign</li> <li>Recapitalize for the homeless</li> </ul>	By June 30, 2016: <ul style="list-style-type: none"> <li>Add 2 church partnerships modeled after Pacific Coast</li> <li>Increase weekly/monthly repeat volunteers by 2%</li> <li>Create monthly meeting of 4 area associations to target neighborhoods producing greatest number of homeless</li> <li>Build reserves to 4 months</li> <li>Use Capital Campaign funds to upgrade facilities &amp; pay down debt</li> </ul>	By June 30, 2017: <ul style="list-style-type: none"> <li>Add 4 church partnerships modeled after Pacific Coast</li> <li>Help 2 partner churches build local community outlying services</li> <li>Validate neighborhood partnerships via surveys</li> <li>Build reserves to 6 months</li> </ul>

## 5. Be discerning when selecting your consultants and his/her planning tools.

- If you don't know what your top three priorities are, you don't have priorities.”
- “What you measure improves.”
- Address your assumptions.



# The **G.N.O.M.E.** Chart: Hearing from God About 3-5 Goals

<b>G</b> oals	<b>N</b> eeds	<b>O</b> bjectives	<b>M</b> ethods	<b>E</b> valuation
Goal #1:				
Goal #2:				
Goal #3				
Goal #4:				

# Planning Tools and Templates (continued):

---

## 6. Build in

**accountability** ➔ **Monthly Dashboards for:**

- Annual Board Goals
- Annual CEO Goals

Tool #10: The 5/15 Monthly Report to the Board

Tool #11: Monthly Dashboard Report





# Planning Tools and Templates (continued):

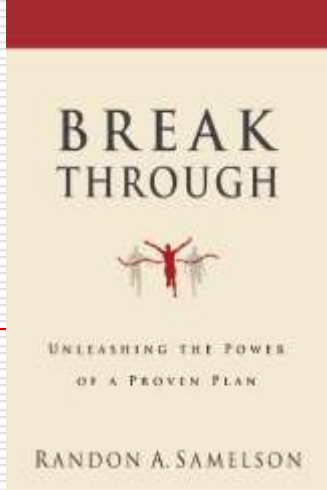
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**7. Inspire your team!** “I wasn’t planning to lead.  
I was standing in the back and then everyone turned around.”  
–Avery Hiebert



# Strategic Planning Next Steps

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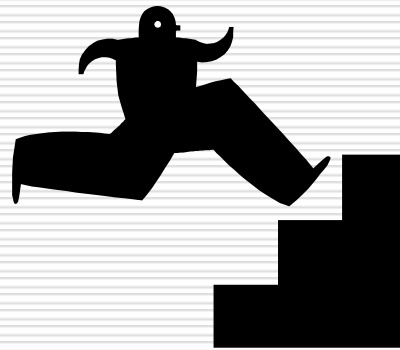
**Does our ministry have a strategic plan  
and does our board  
“own”  
the strategy?**

Read  
*Breakthrough*

[https://urgentink.typepad.com/my\\_weblog/2015/03/breakthrough.html](https://urgentink.typepad.com/my_weblog/2015/03/breakthrough.html)

# **MISTAKE #4: Not Articulating and Owning the Ministry Strategy**

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## **Next Steps & Take-Aways**

p. 48

# DISCERN...(p. 48):

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**MY  
#1 TOP  
TAKE-  
AWAY**



# ▲ THANK YOU! ▲

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