

WELCOME!

Oct. 18, 2024



Order workbooks on Amazon:

<https://amzn.to/3oBQQLy>

▲ *Permission Granted!* ▲

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John Pearson Associates
Board Governance & Management Consultants
2912 Calle Guadalajara, San Clemente, CA 92673
Mobile: 949-500-0334
Email: John@JohnPearsonAssociates.com
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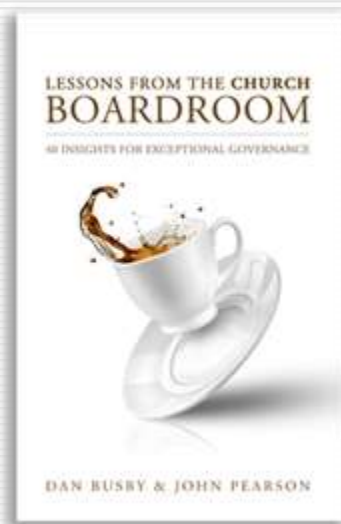
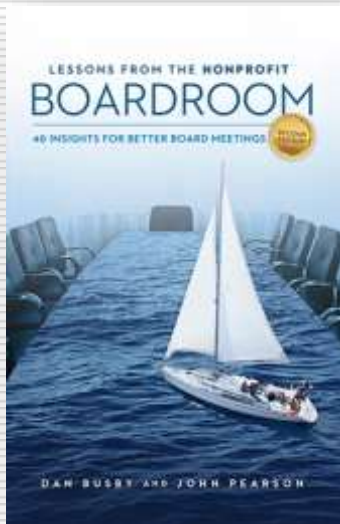
Content adapted from:
www.BoardLeadership.org



M.J. Murdock
CHARITABLE TRUST

DELEGATE YOUR READING!

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

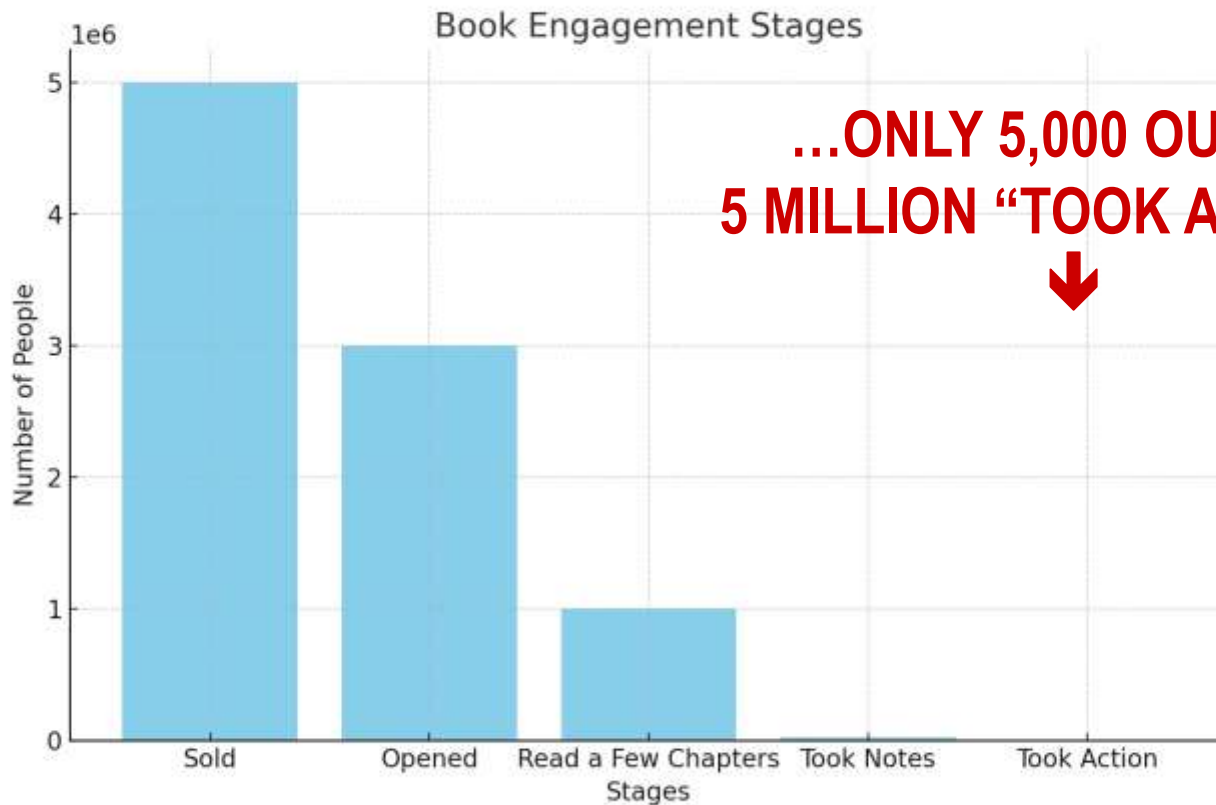


➡ **TOOL #19:**
**Ten Minutes
for Governance**

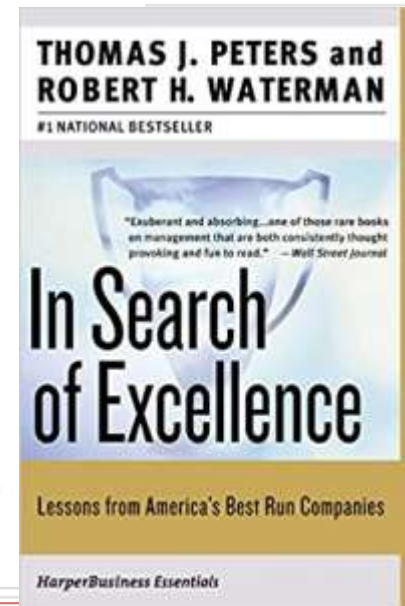
Yikes! Buying vs. *Taking Action!*

5M sold, 3M opened, 1M read a few chapters, 25K took notes... **BUT...**

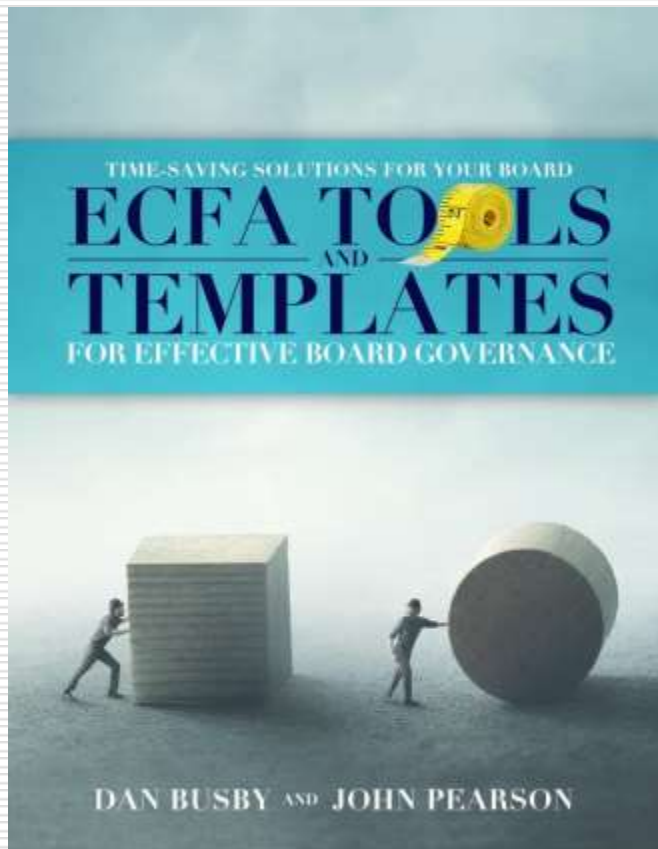
Per email from Gregg Hunter, CEO of CCCA (MBA course, 1/10/2018)



**...ONLY 5,000 OUT OF
5 MILLION "TOOK ACTION!"**



➡ **TOOL #4: Five-Finger Feedback**



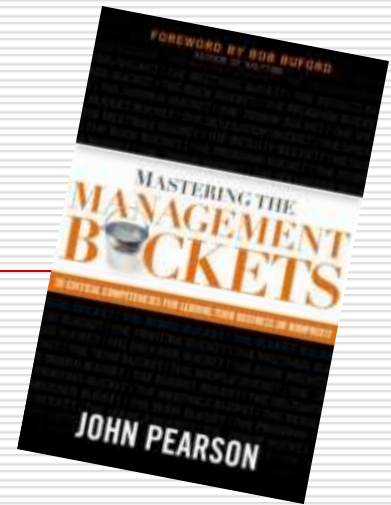
Fast Feedback Tool!



Commentary:

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

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



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.

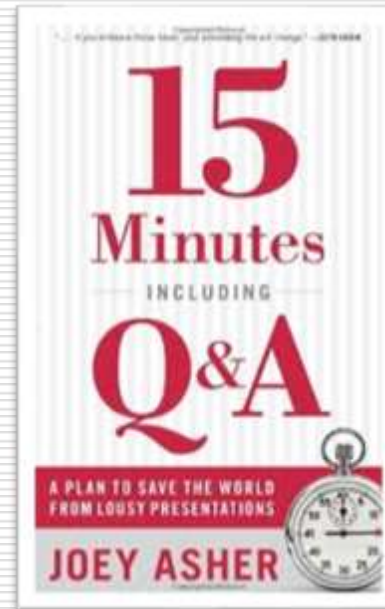


Ron Ellis / Shutterstock.com

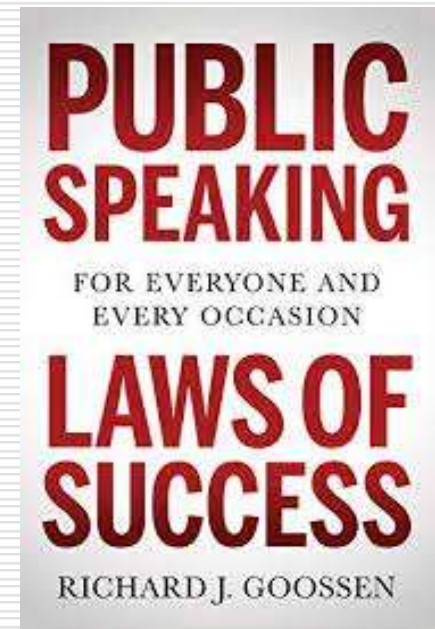
LIFELONG LEARNERS!

“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!



THE 4 BIG MISTAKES TO AVOID WITH YOUR NONPROFIT BOARD

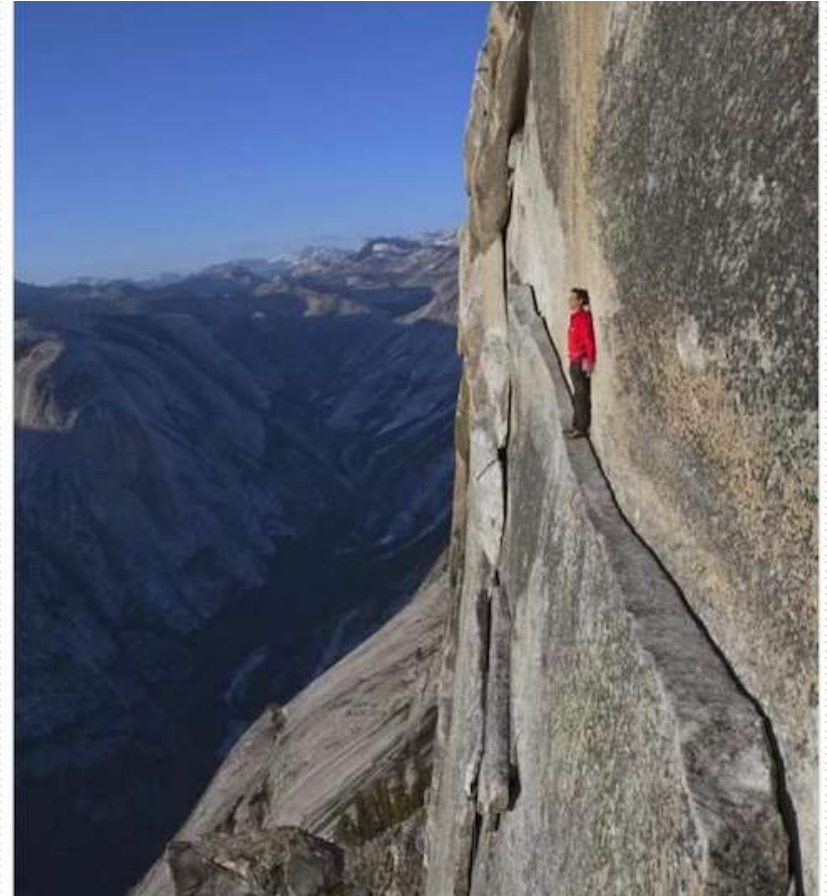
- ❑ **MISTAKE #1:** Not Landing on the Appropriate Sweet Spot on the Continuum Between Policy Governance[®] and Micro-Management!

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

THE 4 BIG MISTAKES TO AVOID WITH YOUR NONPROFIT BOARD

- ❑ **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

- ❑ **MISTAKE #1:** Not Landing on the Appropriate Sweet Spot on the Continuum Between Policy Governance® ...
...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

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[®] and Micro-Management!
4. **Insight:** What's All the Fuss About Policy Governance[®]?
5. **Tool:** The Board Member Annual Affirmation Statement
6. **Tool:** The Prime Responsibility Chart

First...define reality!

***POP
QUIZ!***

See page 6.

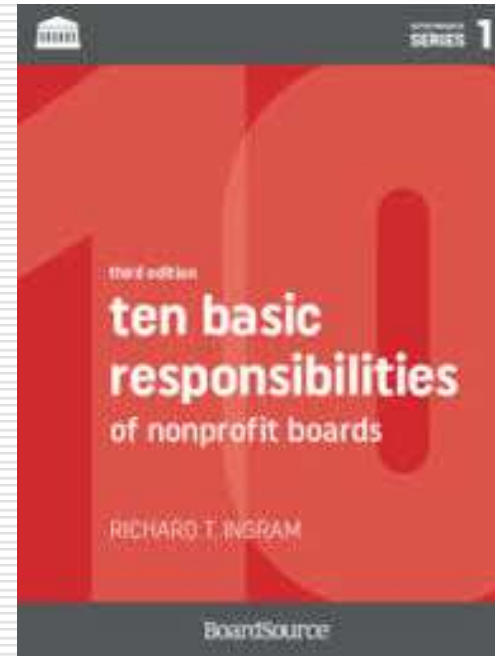
Understanding Board Roles

#1. BOOK:

Ten Basic Responsibilities of Nonprofit Boards

www.BoardSource.org

(page 7)



Understanding Board Roles

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

The Board Member's 3 Hats:

- Governance
- Volunteer*
- Participant



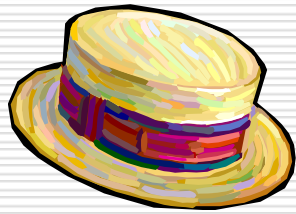
**Volunteering is optional, passion-driven, gifts-based*

THE VIDEO: Balancing Board Roles



<https://vimeo.com/67900544>

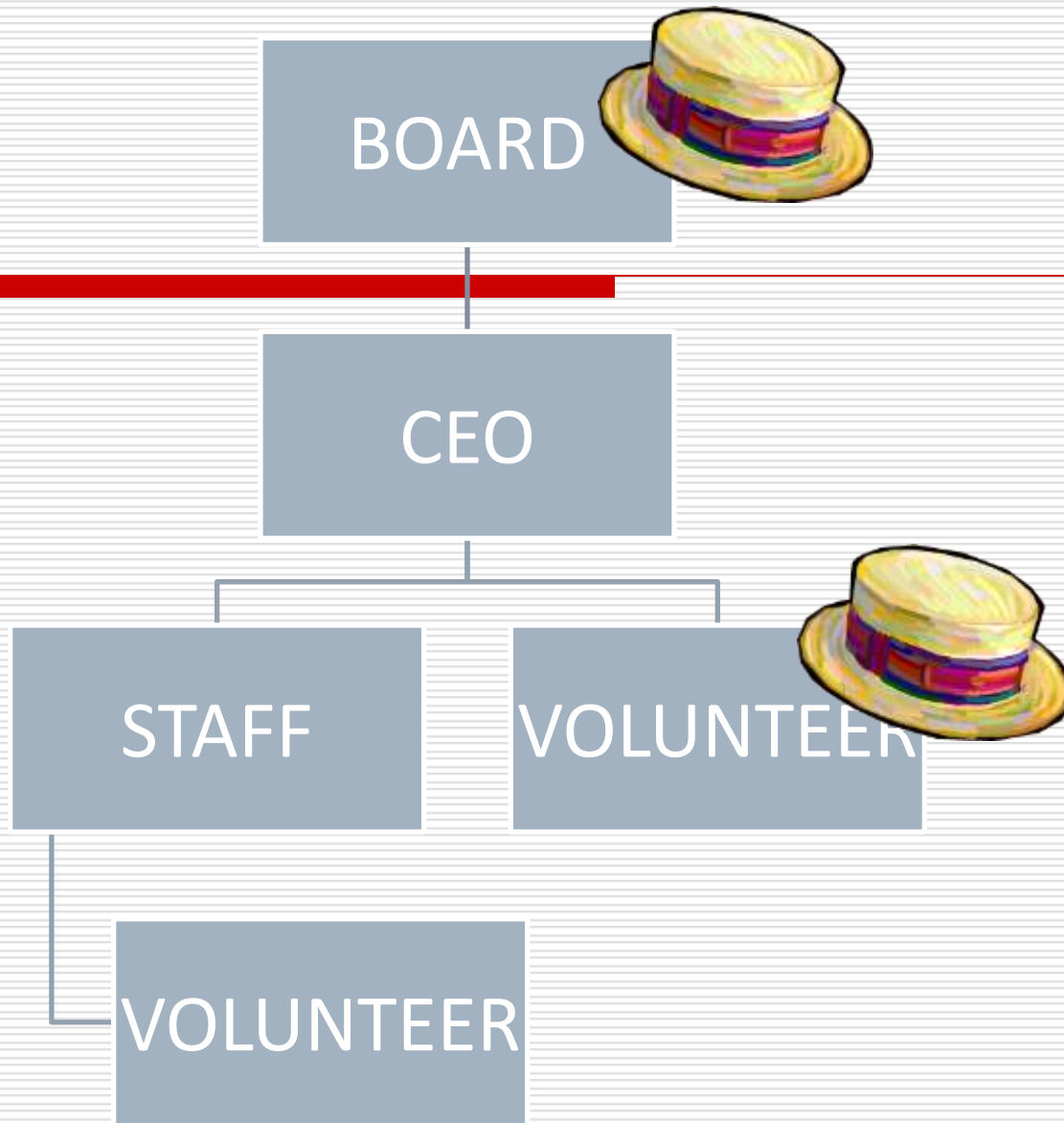
<https://www.ecfa.org/ToolboxSeries.aspx>



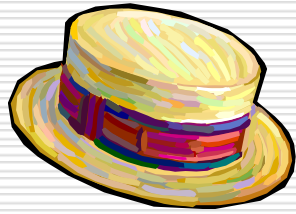
Balancing Board Roles

The Principle:

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



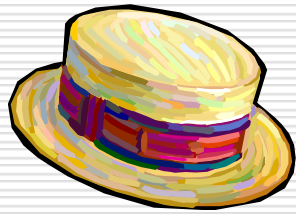
“All of you, clothe yourselves with humility toward one another.” (1 Peter 5:5)



Balancing Board Roles

**Your
Organizational
Chart?**





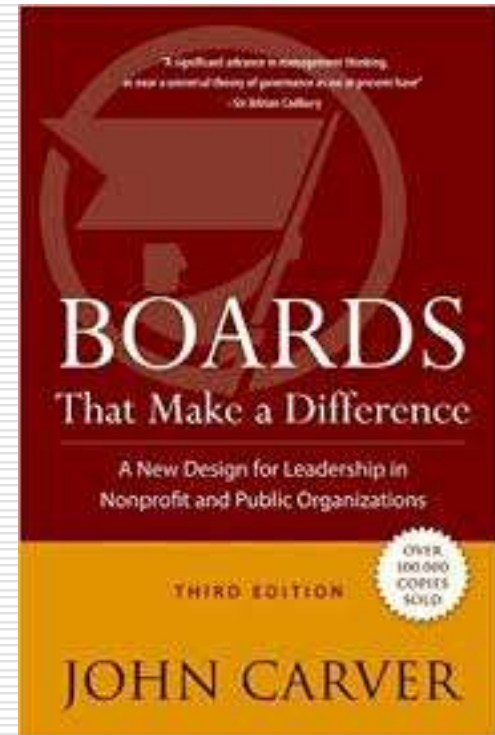
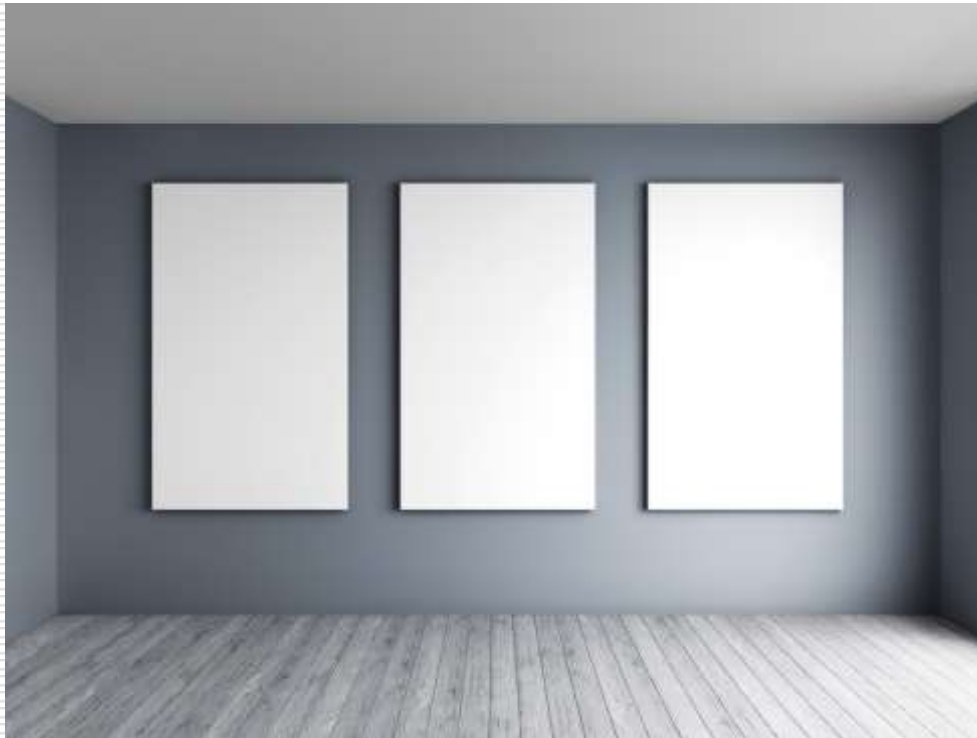
Balancing Board Roles

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

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

#3. EXERCISE: The Continuum Between Policy Governance[®]...and Micro-Management

□ See pages 9 and 10:



WHERE IS YOUR BOARD ON THIS CONTINUUM?

p. 11

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)

BOARD:

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

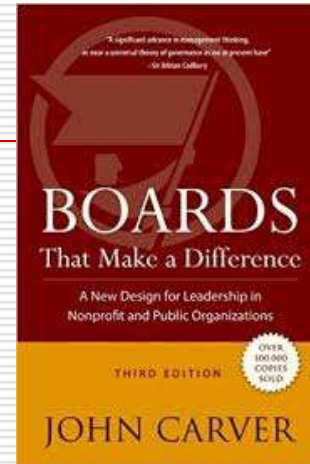
10	9	8	7	6	5	4	3	2	1
----	---	---	---	---	---	---	---	---	---

CEO:

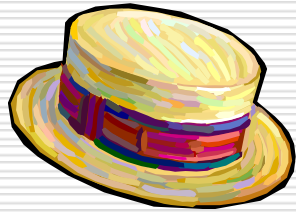
Proactive Leadership.....Reactive Leadership

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

#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:

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

Prime Responsibility Chart (Tool #16)



Prime Responsibility Chart – “Version 6”

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

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



Please stand!

**Pop
Quiz!**



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



#7. **BONUS** BEST PRACTICE!

CEO's Monthly Dashboard Report (Tool #11)

Alan Mullaly Story/Video →

https://urgentink.typepad.com/my_weblog/2024/10/4-leadership-books-and-48-niche-chapters.html



How CEOs Learn to Lead
from the Inside Out

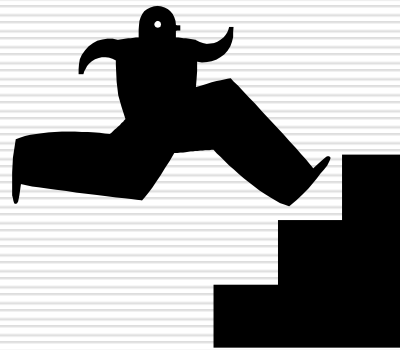
THE JOURNEY OF LEADERSHIP

DANA MAOR • HANS-WERNER KAAS
KURT STROVINK • RAMESH SRINIVASAN
SENIOR PARTNERS AT MCKINSEY & COMPANY

Monthly Dashboard Report

GOAL	TARGET DATE	3-MONTH UPDATE
SMART Goal #1	12/31/2025	
SMART Goal #2	12/31/2025	
SMART Goal #3	9/30/2025	
SMART Goal #4	9/15/2025	

MISTAKE #1: Not Landing on the Appropriate Sweet Spot on the Continuum Between Policy Governance[®] ...and Micro-Management!



Next Steps & Take-Aways

p. 48



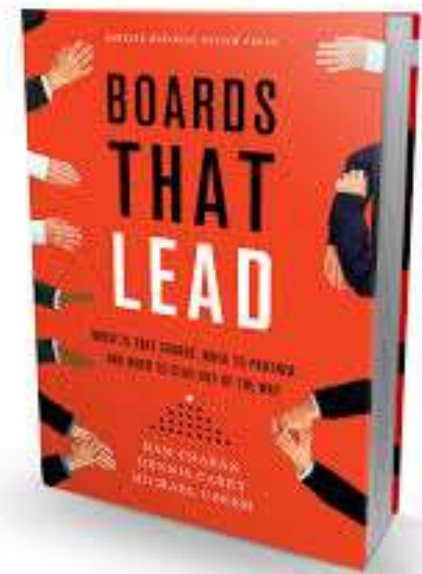
10-Minute Break!

□ **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

❑ **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

The 4 Phases of Board Member Recruitment:

- Cultivation
- Recruitment
- Orientation
- Engagement

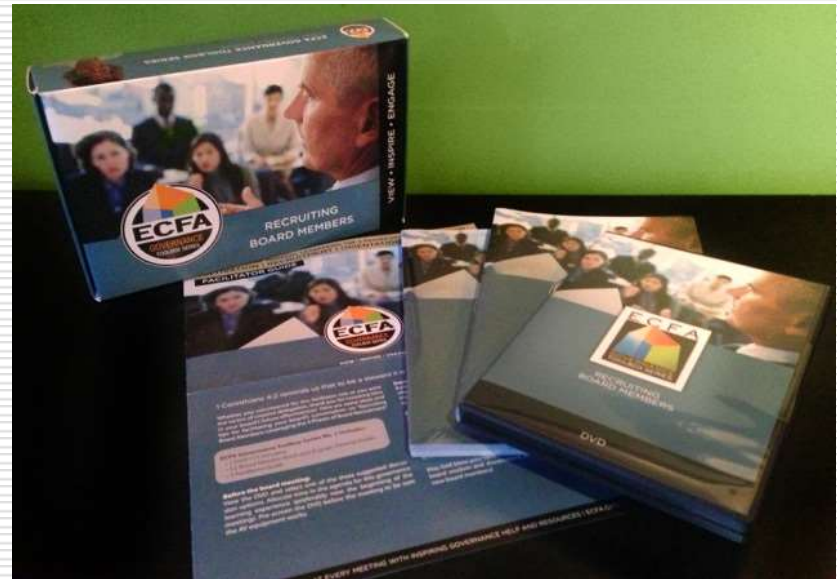
Pages 24-31

THE VIDEO: Recruiting Board Members

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

In this session:

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



Recruiting Board Members

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

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

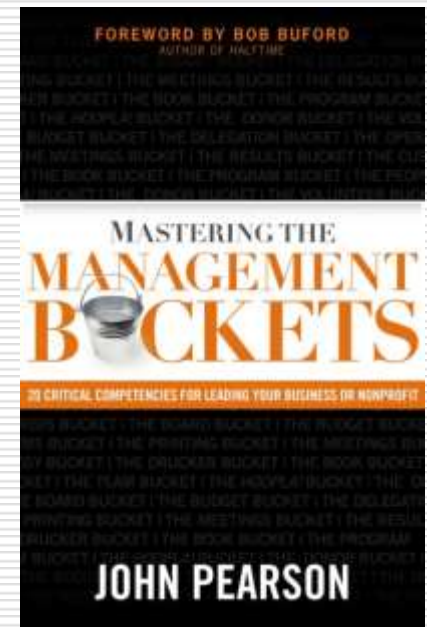
How effective is your board?

Recruiting Board Members

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

7 Steps for Recruiting Board Members:

1) Recruit for passion—not position.



Recruiting Board Members

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

Recruiting Board Members

7 Steps for Recruiting Board Members:

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

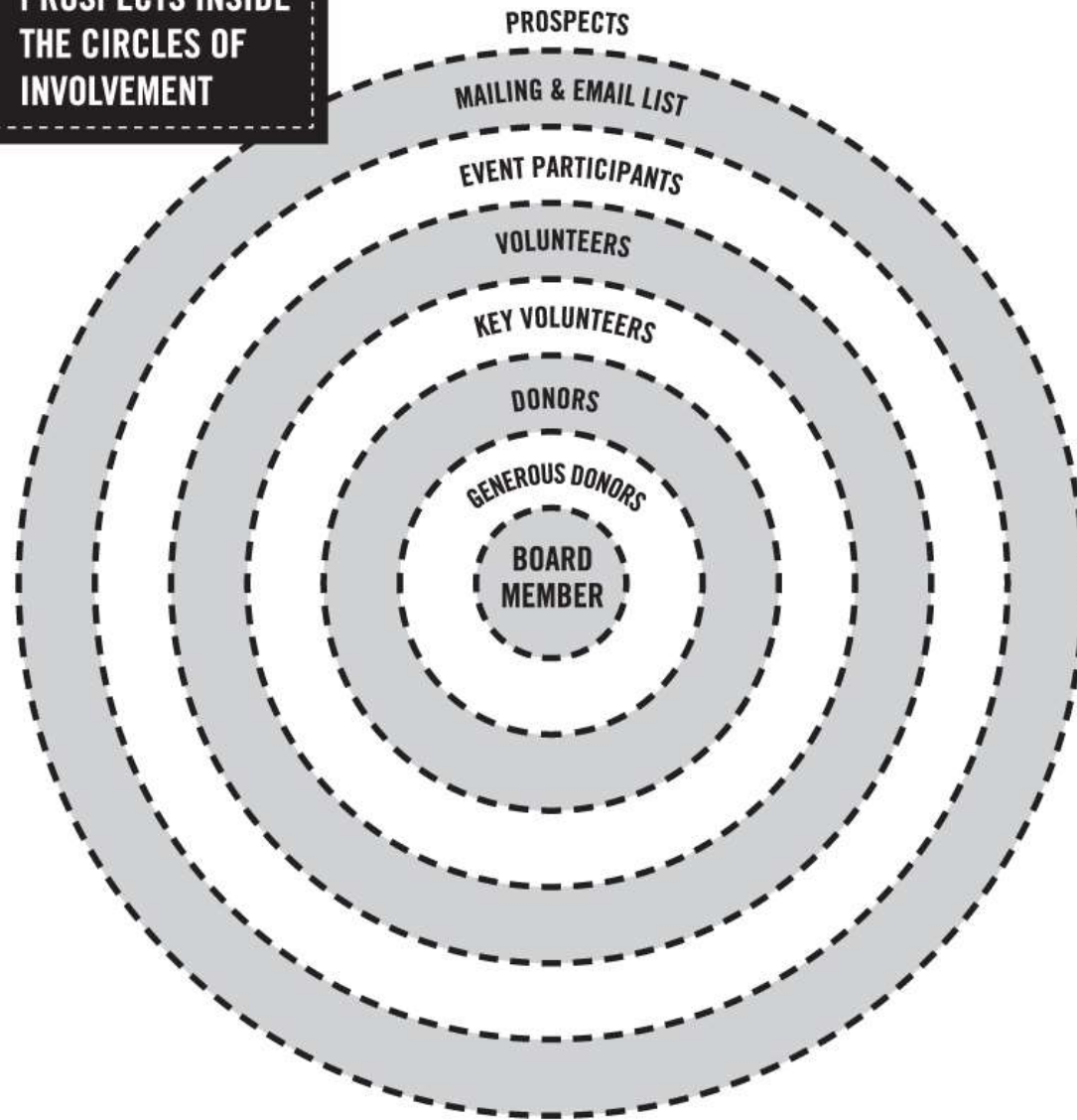
Warning! Resume-Builders Make Lousy Board Members!*

**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

7 Steps for Recruiting Board Members:

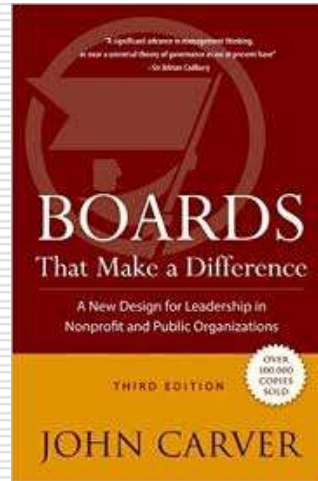
- 1) Recruit for passion—not position.
- 2) Pray before prospecting.
- 3) Date before proposing!
- 4) Inspire your prospect to give generously.
- 5) Propose marriage.
- 6) Continue dating.** (“Ten Minutes for Governance” at every meeting.)

Recruiting Board Members

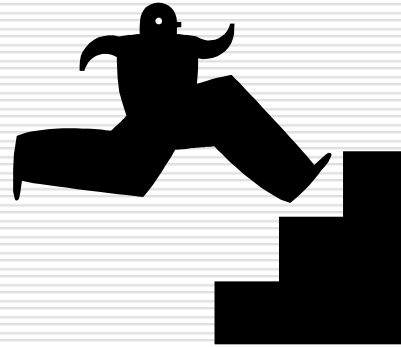
7 Steps for Recruiting Board Members:

- 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**[®]”



MISTAKE #2: Not Dating Board Prospects Before Proposing Marriage



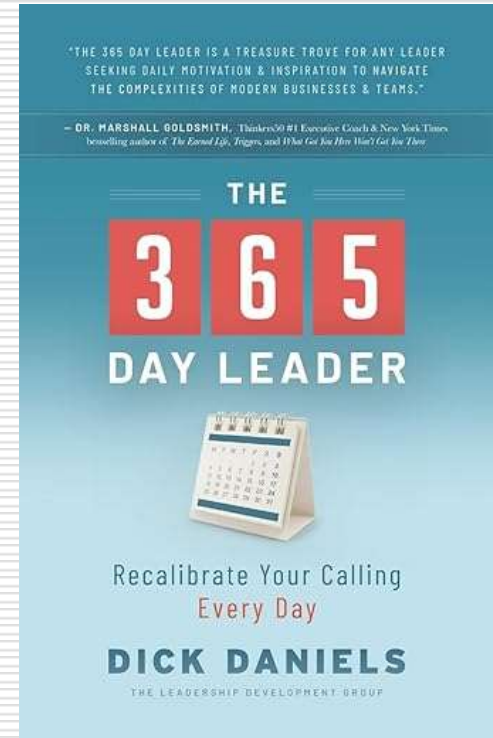
Next Steps & Take-Aways

p. 48



10-Minute Break!

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

“A Board Prayer” by Dan Bolin

<https://www.refuelinginflight.com/boardprayer>



Coming Fall 2024!

THE 4 BIG MISTAKES TO AVOID WITH YOUR NONPROFIT BOARD

❑ **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:

Spiritual Gifts

Strengths

Social Styles

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

p. 34

Please stand!

**Pop
Quiz!**



▲ 3 Big Ideas (page 34)

The 3 Powerful S's

Spiritual Gifts

Strengths

Social Styles

▲ *Tom Rath* ▲

“...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.

“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

□ **S**piritual Gifts

➔ **S**trengths

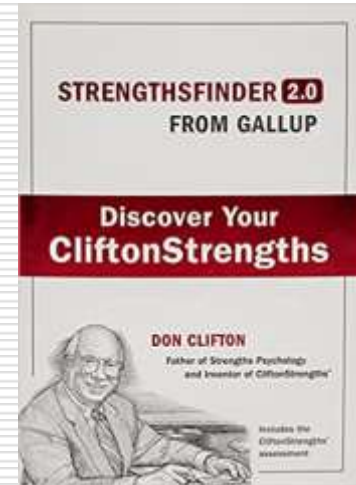
□ **S**ocial Styles

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 **Russ** and minimize his weaknesses.
- ❑ More information at:
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
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Discipline	Self-Assurance	Includer	Intellection
Focus	Significance	Individualization	Learner
Responsibility	Woo	Positivity	Strategic
Restorative		Relator	RUSS

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	JIM WEST

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	How would you work with JVD?

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	How would you work with Todd?

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	U.I. MGT TEAM #1 STRENGTHS

4 StrengthsFinder Tools

Tool #1: Tent Card



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

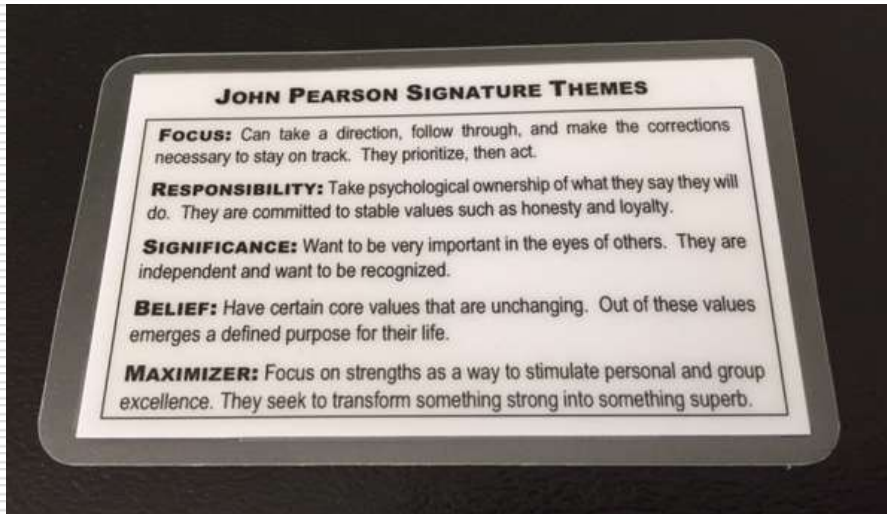
Updated: 3/26/2018

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>



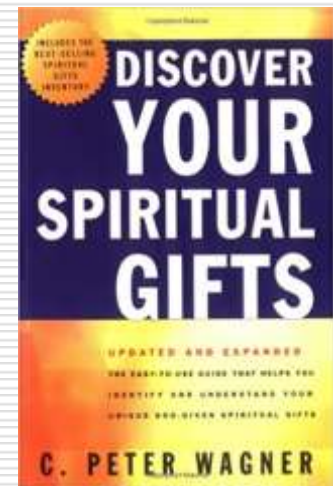
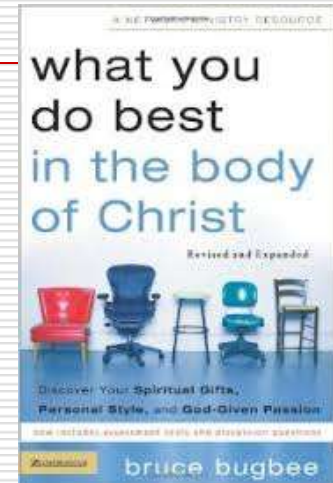
The 3 Powerful S's

➔ Spiritual Gifts

- Strengths
- Social Styles

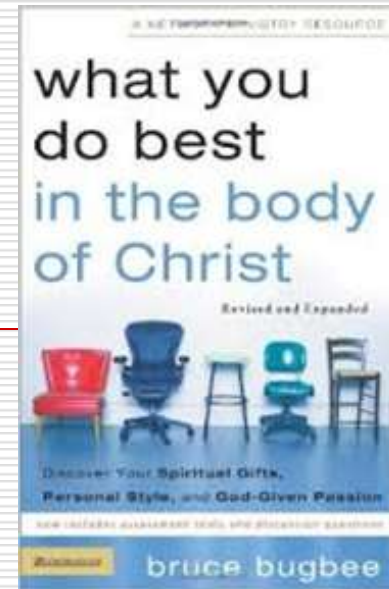
▲ 2 books on spiritual gifts

- **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

→ 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**

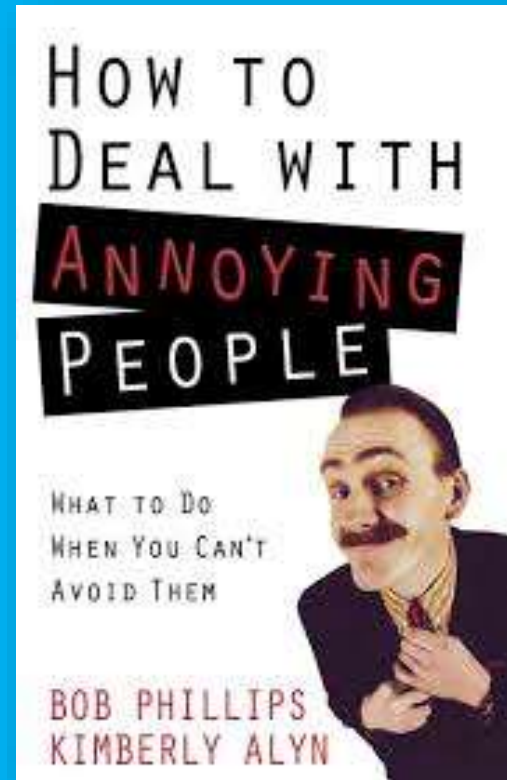
**Find your comfort zone and
help others feel comfortable.**



The 4 Social Styles

How to Deal With Annoying People

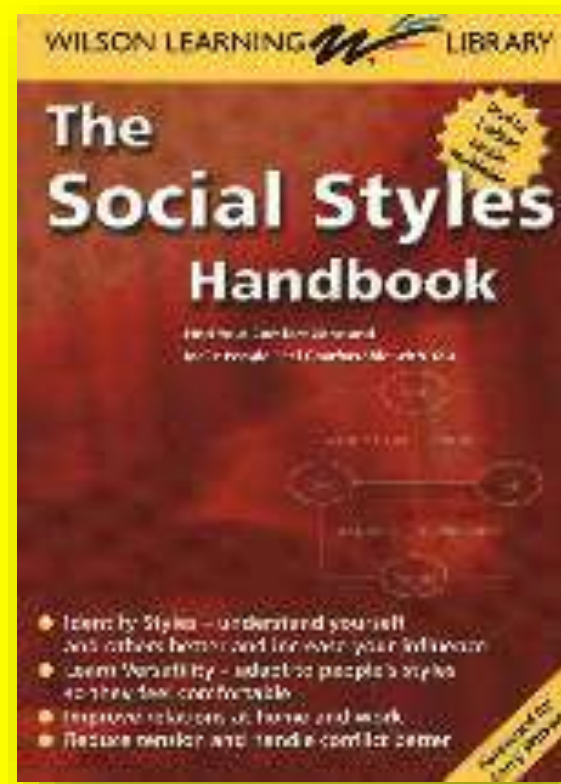
Bob Phillips



The 4 Social Styles

The Classic:

The Social Styles Handbook





The People Bucket Ball #1

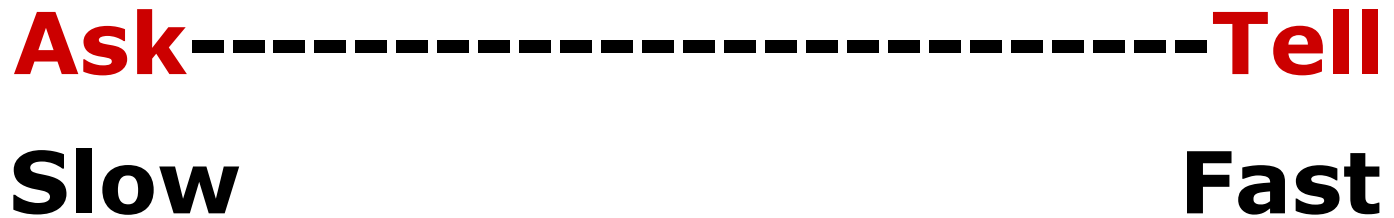
**Know Your Social Style:
Effective Leaders Are
Versatile!**

**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-----**Tell**
Slow-----**Fast**

EMOTE
Feelings & Intuition

The 4 Social Styles

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

Priority in common
(Control - Emote)

Analyticals

Drivers

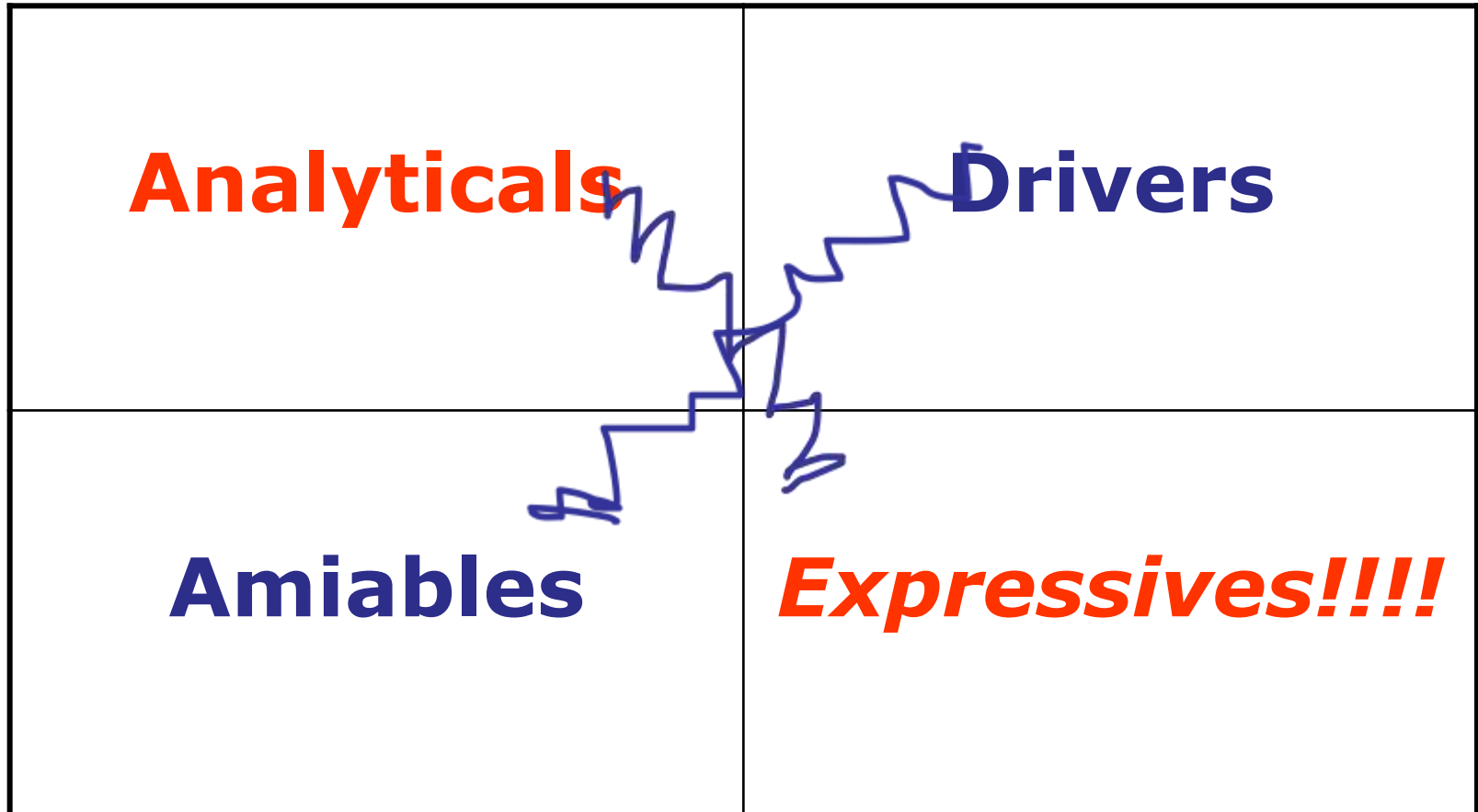
Amiables

Expressives!!!!

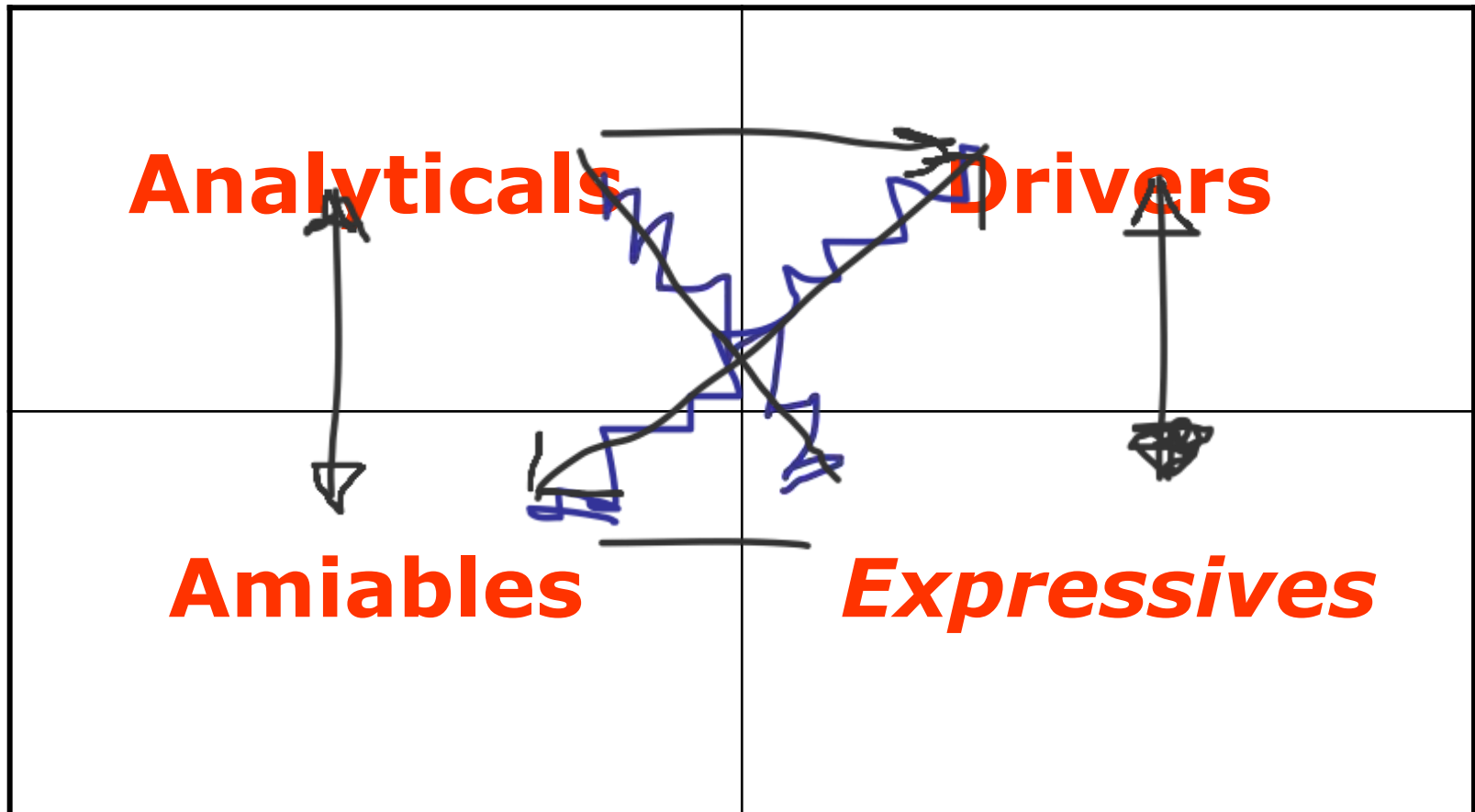
Pace in common (Slow - Fast)

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

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

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



TRACOM GROUP
THE CREATOR OF SOCIAL STYLE®

www.socialstyle.com

6 TIPS AMIABLE STYLE

How to Work with Amiable Style People

1 **APPROACH**
conflict carefully

2 **GET TO**
know them

3 consider their
PERSPECTIVES

4 draw out their
OPINIONS

5 handle issues in
PRIVATE

6 always be
COURTEOUS



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www.socialstyle.com

6 TIPS EXPRESSIVE STYLE

How to Work with Expressive Style People

1

LAUGH
with them

4

RECOGNIZE
their contributions

2

LISTEN
to their opinions

5

LIGHTEN
UP

3

THINK BIG
picture

6

form a
FRIENDSHIP



TRACOM GROUP
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www.socialstyle.com

Social Style: *Easier to learn and remember!*

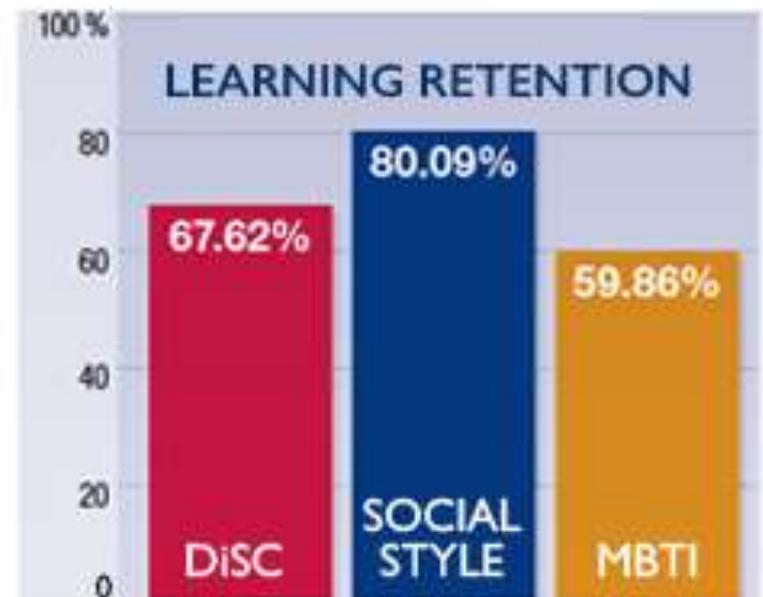
<https://tracom.com/social-style-training/model>

**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

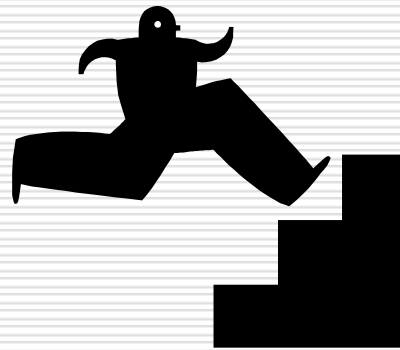
Video: 10½ minutes

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



Next Steps & Take-Aways

p. 48



10-Minute Break!

WATCH FOR REVIEW!

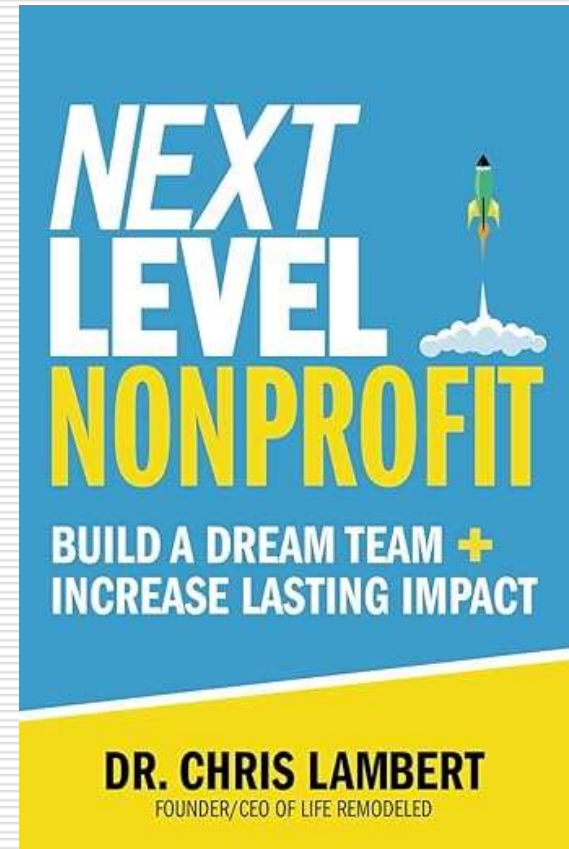
https://urgentink.typepad.com/my_weblog/

Next Level Nonprofit

See the 20-question

Organizational Assessment

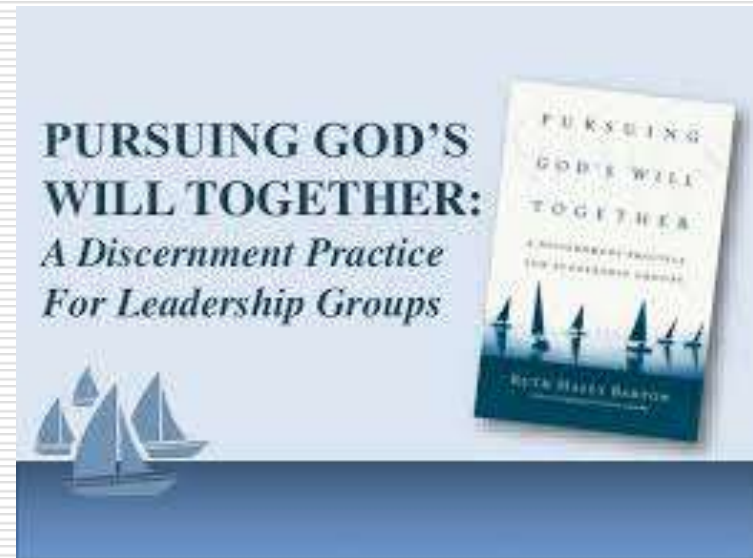
<https://www.nextlevelnonprofit.org/>



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

Los Angeles Times
SUNDAY, NOVEMBER 8, 2020
latimes.com

BIDEN WINS

LANDMARK ASCENT FOR HARRIS

As crowds celebrate across U.S., Trump has yet to concede

VP-elect takes her place in history

By MELANIE MARON

With her election to the second-highest post in the nation, Kamala Harris has secured her place in history as a first — several times over.

The first woman to be vice president, first Black person, first Asian Ameri-

VICTOR REACHES OUT TO DIVIDED NATION

By MARK E. HARRAR, JAMES BUCK, AND MOAN DIERMAN

WILMINGTON, Del. — Joe Biden was elected the nation's 46th president Sat.

Did your strategic plan imagine this?

July 21, 2024



Scenario planning for: Nov. 5, 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

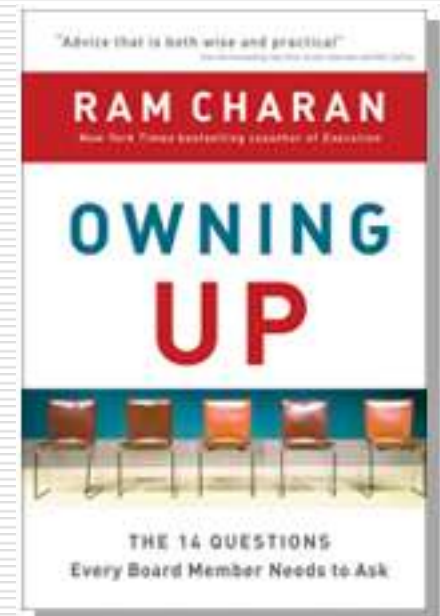
Focusing Versus Micro-managing

#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://www.wsj.com/articles/technology-bubble-ask-waffle-house-1424754062?reflink=desktopwebshare_permalink

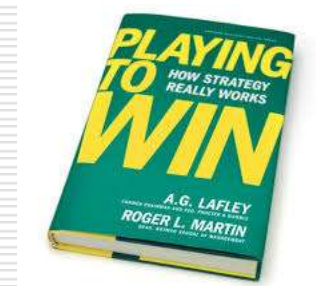
The Best Boards Own the Strategy

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

- ❑ *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

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!



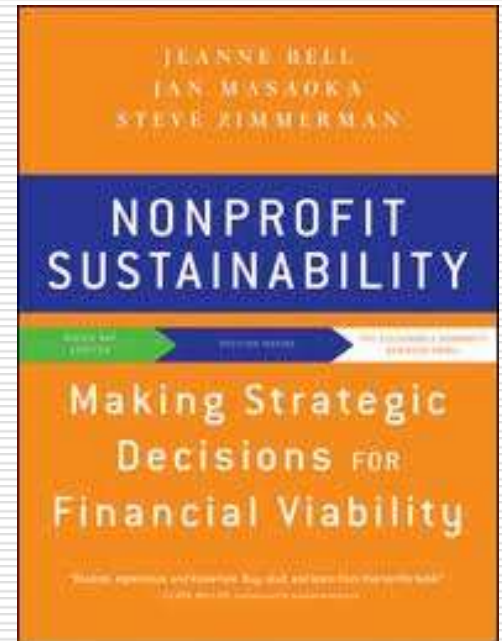
Focusing Versus Micro-managing

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

my opinion:

#3. The Best Boards Use a...

Rolling 3-Year Strategic Planning Process

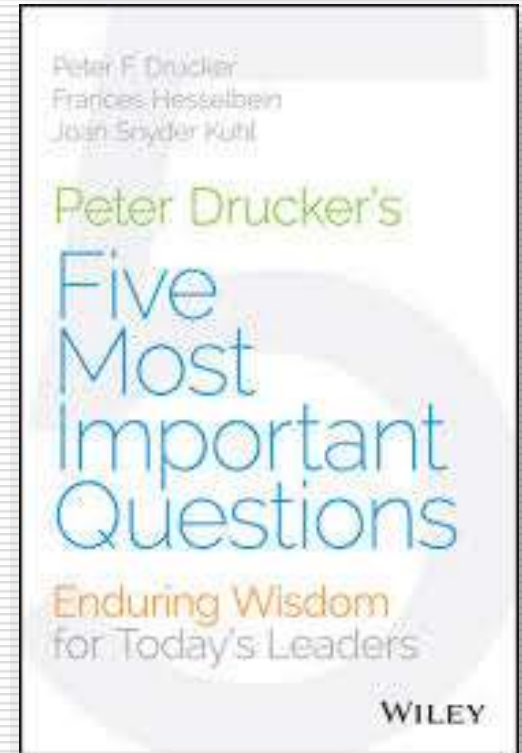
**...and Systemically Look Ahead
Every Year**

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

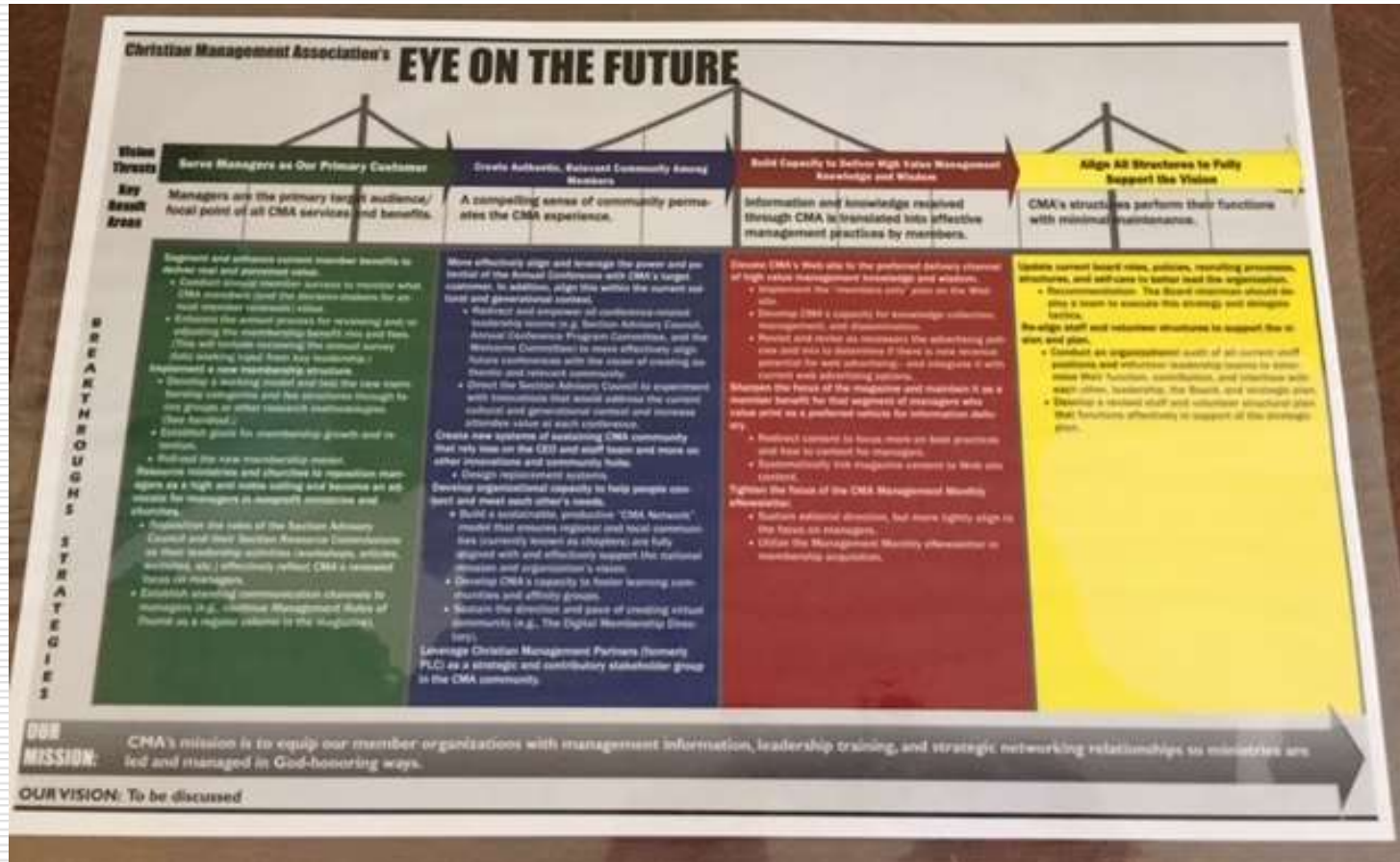
4. Summarize with a “Strategic Plan Placemat”

3-5 Visionary Priorities:	2025	2026	2027	By Fall 2025, add: 2028
SMART Goal #1				
SMART Goal #2				
SMART Goal #3				
SMART Goal #4				
SMART Goal #5				

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

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

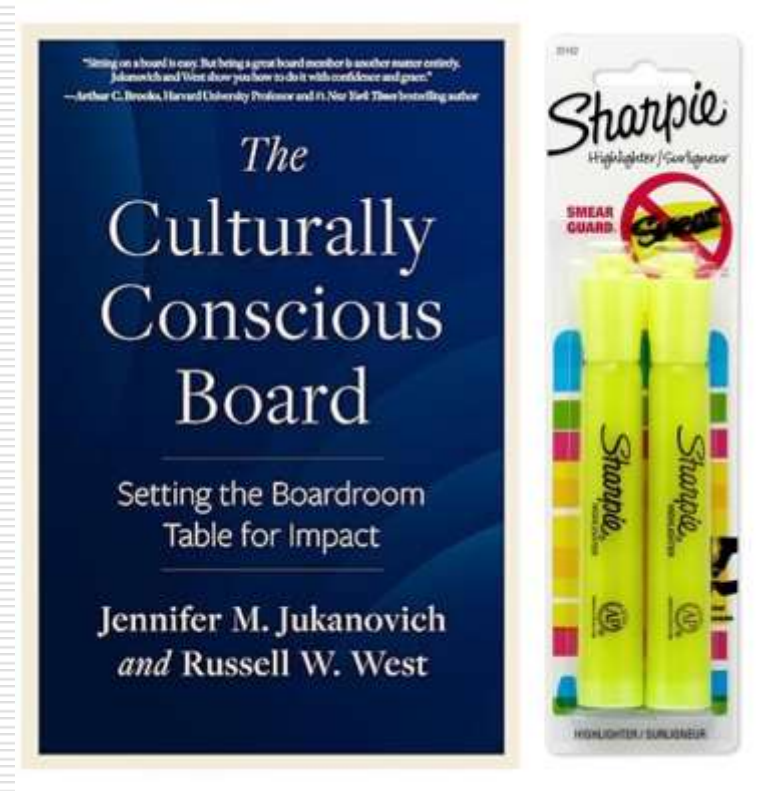
	Year 1: FY15 July 1, 2014 – June 30, 2015	Year 2: FY16 July 1, 2015 – June 30, 2016	Year 3: FY17 July 1, 2016 – June 30, 2017
GOAL #1 • Build Our Team	By June 30, 2015: • Finalize Market compensation analysis • Offer 3 leadership training courses to managers (AGB), succession plan • Complete staff survey • Theme verse for the year: Phil 4:8	By June 30, 2016: • Restore merit increases up to 2% • Increase 401k match to 4% • Offer 3 leadership training courses to managers • Reduce turnover by 10%	By June 30, 2017: • Restore merit increases up to 2% • Increase 401k match to 5% • Offer 3 leadership training courses to managers
GOAL #2 • Build Our Programs	By June 30, 2015 unless otherwise noted: • Reach 85% occupancy at HG by October 31, 2014 • Investigate long-term restorative housing at HQ • Open Thrift Store • Add interns to meet with guests in day rooms • Partner with Bible to measure life transformation • Expand guest surveys and perform by 1/31/2015 • Investigate offsite men's recovery program	By June 30, 2016 unless otherwise noted: • Meter lease agreements to program production/lost practices • Add Chaplains to meet with guests in day rooms • Start women's recovery program • Identify location for 2 nd Thrift Store and Production Center • Utilize Bible results to improve life transformation by implementing recommendations • Explore transitional program for youth 16-25 • Continue to investigate offsite men's recovery program	By June 30, 2017 unless otherwise noted: • Implement offsite men's recovery program • Open second Thrift Store by Jan 1, 2017
GOAL #3 • Build Our Network	By June 30, 2015: • Add 1 church partnership modeled after Pacific Coast • Increase weekly/monthly repeat volunteers by 2% • Establish program to engage neighborhoods producing greatest number of those experiencing homelessness • Build reserves to 3 months • Begin Phase I of Capital Campaign • Recruitment for the homeless	By June 30, 2016: • Add 2 church partnerships modeled after Pacific Coast • Increase weekly/monthly repeat volunteers by 2% • Create monthly meeting of 4 area associations to target neighborhoods producing greatest number of homeless • Build reserves to 4 months • Use Capital Campaign funds to upgrade facilities & pay down debt	By June 30, 2017: • Add 4 church partnerships modeled after Pacific Coast • Help 2 partner churches build local community outlying services • Validate neighborhood partnerships via surveys • Build reserves to 6 months

This book **CHANGED** my thinking!

https://urgentink.typepad.com/my_weblog/2024/09/the-culturally-conscious-board-setting-the-boardroom-table-for-impact.html

The Culturally Conscious Board: Setting the Boardroom Table for Impact

Jennifer M. Jukanovich
and
Russell W. West



The Culturally Conscious Board

THE BOARD PLACEMAT

INTENTION

- We consult mission, vision, values during decisions.
- We examine policies for fairness, equity and inclusion.
- We expect status reports on the vision-based promise to stakeholders.
- We are convinced our theory of change makes a difference.
- We prioritize our programs through a strategic plan.

INVITATION

- We leverage our mission and story to attract stakeholders.
- We recruit members who add capacity, not merely fill.
- We gather stakeholder feedback to lift our cultural blindspots.
- We embrace a partnership of equals, a participatory approach.
- We cultivate diverse candidate pools when recruiting.

IMPACT

- We measure our efforts by evidence-based outcomes regularly.
- We avoid dependencies and potential conflicts.
- We compare results to stated intentions, promises.
- We harvest learning after events, milestones, talks, wins.
- We recognize, celebrate, celebrate efforts of the team.

INVESTMENT

- We require budget priorities to reflect mission intent.
- We fund evidence-based efforts to outcome strategies.
- We ask "how can we afford to be afforded too?" instead of "can we afford it?"
- We model our mission engagement by participating financially.
- We build board capacity through cultural members and advisors.

IDENTITY

- We reflect our organization.
- We make values visible.
- We align our work with our talk.
- We honor the mission, vision, values, and team.
- We make sure to know our members' names.

SET THE TABLE

1 MARK THE TABLE

2 COMPARE EXPERIENCE

3 DECIDE: START NEW ACTIONS

SCAN ME
download here

CulturallyConsciousBoard.com

Next Level Nonprofit (2-page plan)

<https://www.nextlevelnonprofit.org/resources/>



WHERE ARE WE GOING?

OUR WHY

Consider both of the ways they need, but they don't have access to get the opportunities they deserve.

HOW WE DO IT

Opportunity Hub: We maximize impact by using the community-based organization to address barriers to their life by doing building with the best and brightest nonprofits and their collaboration & work to gather more together.

4-By Project: We leverage thousands of students and 200+ to launch career opportunities.

Skills Programming: We create transformative experiences for job skills in the areas of leadership, development, analysis, innovation, and career education.

WHAT WE DO

We leverage our own and community and organizations to create opportunities for students that work.

THE BIGGEST PROBLEM

As a result of our country's underfunded and underfunded systems, careers, many students are not prepared to thrive in the world of tomorrow's economy, and health & wellness.

OUR CULTURE

1. COMMUNITY FIRST
2. ALWAYS FIND A WAY
3. BUILD PARTNERSHIP

10-YEAR VISION/IMPACT

Specific how successful and self-sustaining South Opportunity Hub will increase the number of job opportunities that is greater than 1000.

3-YR GOALS

- * Total Revenue = \$1,000,000
- * Operating Revenue = \$600,000
- * Investment Income = \$400,000
- * Net Income = \$200,000
- * 20% of 4-By Project will have 1000+ students
- * 25% of students served by the 4-By through youth programming, workforce development, and leadership training.
- * 10,000+ students served by South Career through youth programming, workforce development, leadership training, and skills & culture programming.
- * 50+ Employees - High Profile, High Tech
- * Community advisory council provides ongoing with expertise Opportunity Hub
- * 50% of South Career students participating in 4-By

- * 80% of Opportunity Hub participants feel empowered "above and beyond" required.
- * 90% of youth participants feel safe at Opportunity Hub.
- * 80% of youth participants enjoy Opportunity Hub programs and report increased hope for the future.
- * 70% of youth participants perceive problems growth in reading, math and other outcomes by product of their experience in our Opportunity Hub.
- * 90% of students report significant value added and increased collaborative opportunities.
- * Opportunity Hub maintaining 90%+ retention.
- * 200+ staff and 500+ volunteers generated \$100,000 annually.
- * South Career authorized and generated \$50,000 annually.
- * 1,000+ students for the 4-By Project.

NEXT LEVEL NONPROFIT



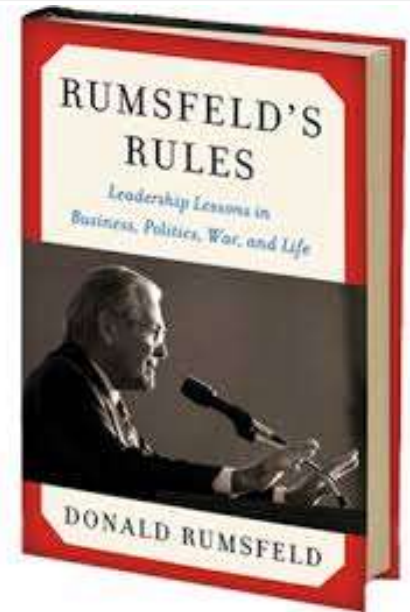
BUILD A DREAM TEAM + INCREASE LASTING IMPACT

DR. CHRIS LAMBERT
FOUNDER/CEO OF LIFE REMODELED

122

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

G oals	N eeds	O bjectives	M ethods	E 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



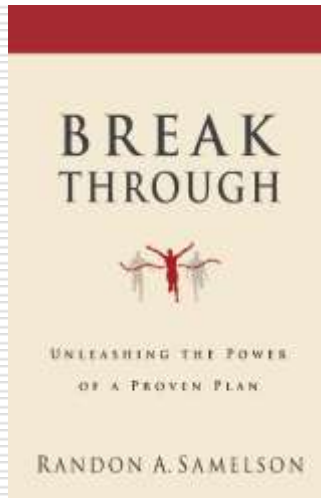
Planning Tools and Templates (continued):

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

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

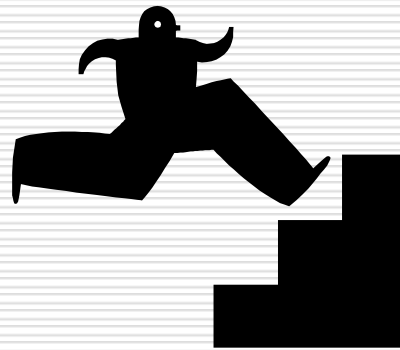


← **Listen to the 10-minute “AI” podcast!**

https://urgentink.typepad.com/my_weblog/2015/03/breakthrough.html

<https://urgentink.typepad.com/pails/2024/10/mindshift-transform-leadership-drive-innovation-and-reshape-the-future.html>

MISTAKE #4: Not Articulating and Owning the Ministry Strategy



Next Steps & Take-Aways

p. 48

DISCERN...(p. 48):

MY
#1 TOP
TAKE-
AWAY



▲ THANK YOU! ▲

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John Pearson
John Pearson Associates, Inc.
2912 Calle Guadalajara, San Clemente, CA 92673
Mobile: 949-500-0334
Email: John@JohnPearsonAssociates.com
www.ManagementBuckets.com

