



**Introduction to:**

*Developing a Board Training Strategy*

The purpose of this presentation is to help the board of directors of a Community Action Agency (CAA), as well as individuals and organizations supporting the board, design a plan for providing training and orientation to the CAA’s board members regarding their roles and responsibilities. Many CAAs and organizations that support them understand the need to implement a comprehensive and systematic approach to educating board members—whether it be the initial orientation for new directors, or ongoing training for the board—but lack the capacity to develop a strategy for delivering high-quality board training. This presentation aims to help boards take a step back and consider the basic building blocks of good board training—the **Why? Who? Where? When? How?** and **What?** of board training.

We envision that a variety of individuals or organizations could use this presentation to work with the CAA board to develop a strategic and systematic approach to board training. These could include the governance committee of a CAA’s tripartite board, state community action associations, executive directors, the staff liaison to the board, and/or outside board consultants. Additionally, state community action associations can adapt this presentation to develop state-level board training strategies working with their network of local CAAs and other stakeholders such as their State CSBG Lead Agency. State Associations could hold facilitated discussions at their board meetings or during conferences to plan an annual board training strategy.

The training does not include substantive information about training topics but rather is aimed at helping a board determine the topics and best methods for conveying information about them. Some regional and or state training and technical assistance (T/TA) associations that support local CAAs have developed CAA-specific resources that may be incorporated into a board training strategy. For example, the Illinois Association of Community Action Agencies offers a complete series of [Board Training videos](#).

Additionally, a number of organizations provide substantive resources around a board’s roles and responsibilities generally and may be useful to those developing training programs. Some of the organizations we regularly consult include:

Organization	Focus	Resource Example
<a href="#">State Nonprofit Associations</a>	General governance training resources for nonprofit boards; often specific to nonprofits in the state	<a href="#">Guiding Principles + Practices for Nonprofit Excellence in Maine, 4<sup>th</sup> Edition</a>
<a href="#">BoardSource</a>	Governance and leadership resources and services for nonprofit boards	<a href="#">Boardroom Chemistry: Getting Your Board to Govern as a Team – A BoardSource Toolkit</a> (for purchase)
<a href="#">Propel Nonprofits</a>	On-demand short trainings and brief publications with a financial focus	<a href="#">Financial Information and Your Board Primer Video</a>

Organization	Focus	Resource Example
<a href="#">National Council of Nonprofits</a>	Variety of resources for nonprofits on a range of issues; a focus on trends and local policy issues affecting nonprofits nationwide	<a href="#">Best Practice Micro Learning Module – What to look for when reviewing the IRS Form 990 before filing</a>
<a href="#">CompassPoint</a>	Resources and services on a range of issues including leadership and management, executive transitions, finance and strategy and governance	<a href="#">Governance Documents Templates</a>
<a href="#">Bolder Advocacy</a>	Extensive resources on lobbying and political activity by 501(c)(3) and 501(c)(4) tax-exempt organizations	<a href="#">The Rules of the Game: A Guide to Election-Related Activities for 501(c)(3) Organizations</a>
<a href="#">Grantspace</a>	Fundraising and sustainability resources for nonprofits.	<a href="#">Your Board and Fundraising Webinar</a>
<a href="#">The Bridgespan Group</a>	Resources and services for nonprofits on a range of issues	<a href="#">The Nonprofit Board’s Role in Onboarding and Supporting a New CEO</a>
<a href="#">Nonprofit Risk Management Center</a>	Resources and services that help nonprofit leaders identify and manage risks and empower them to leverage opportunities	<a href="#">Succession Planning for [NOT] the CEO</a>

Lastly, be sure to check-out the resources and trainings available on the CAPLAW and Partnership website that may be used to create or populate governance trainings.

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