CONDUCTING A SELF-EVALUATION OF YOUR CENTER

Reasons to Evaluate

Support
As a board, you have the responsibility to provide support for the volunteers who staff the center. This support is not limited to the “pat on the back” but includes a thorough questioning of all aspects of the ministry. Your Center Director, counselors, and others will truly appreciate your efforts in seeking ways to improve the center.

There are two components to providing quality support as a board. The first is to be an active listener so you hear the staff share their needs and frustrations. The second is to be pro-active in making decisions so you maintain an effective ministry and show you are truly responsive to the needs of the center.

Enhancement
Conducting evaluations are a means to reveal areas of need and to determine a course of action that will lead to improvements. Many people think of an evaluation as an exercise in identifying the weaknesses. Your evaluations should rather look for ways in which the ministry can be improved so the mission can be accomplished more effectively.

Leadership
When hearing from Center staff, I often hear that the board is a group of wonderful men who are mostly ineffective. For the most part, I believe that is correctable, but I also believe that many board members have not received adequate training or encouragement to be effective leaders. A board that conducts routine evaluations will be seen as a board that not only cares, but is actively doing something positive. The end result is that you will find more satisfaction as a board member and realize more positive results for the ministry.
Critical Areas to Evaluate

Spiritual

For individual board members
Encouragement to counselors/hotliners
For clients
For your own family
For area congregations

Financial

Evaluating your receipts and expenses
Effective budgeting
Proper motivation in financial planning
Fund-raising
Buying the special needs

Organizational

How meetings are structured
Proper length of your meetings
Appropriate frequency for meetings
Who runs the meeting
What rules guide your meeting
Written vs. verbal communications
Communications pre- and post-meeting
Paper vs. electronic communications
Purpose of communications (inform, encourage, direct, record/archive, etc.)
Pregnancy Counseling/Life Resource Centers
Evaluating Your Center

Facility – Outside
- Clean, welcoming, professional
- Signage
- Parking
- Bus lines
- Safety
- Accessibility
- Easy to find

This section is meant to help you evaluate your center from the aspect of a client who is getting a first impression. In most cases, our Chapters rent office space and are limited in some of the things that can be done on the outside, but yet some suggestions for improvement might be welcome because the efforts will increase the overall value of the building which obviously benefits your landlord.

Notes:______________________________________________________________________________________
___________________________________________________________________________________________
___________________________________________________________________________________________

Facility – Inside
- Clean, welcoming, professional
- Signage for identification and hours of operation
- Comfortable furniture
- Appropriate and current reading materials
- Brochure rack organized and filled with current materials
- Accessibility for disabled clients
- Bathroom is handy
- Counseling rooms are comfortable
- Counseling rooms provide privacy
- Reception desk/area is neat and orderly
- Staff office or workroom is available but private
- Files are kept in lockable file cabinet
- Files are not easily visible to visitors
- Equipment is working effectively and accessible
- Computer has password system for security
- Storage area(s) are organized and well-stocked

This section helps you review the center as clients see it once they are inside. Remember that most clients are nervous and really don’t know much about our center. The facility needs to be warm, welcoming, and secure to provide the comfort level that allows a client to discuss their situation and concerns. You do not need to provide the most expensive furnishings, but the setting should reflect the Christian love that is going to be provided.

Notes:______________________________________________________________________________________
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Christian Life Resources - 2006
Staff

- You have established job descriptions for your Center Director, counselors, hot-liners, and others
- You review the job descriptions and job performance on a regular basis
- You help with volunteer recruitment
- You provide encouragement to your center volunteers
- You support and encourage annual re-certification for your volunteers
- You encourage the staff to pursue spiritual growth through individual and group Bible study
- You help identify special projects that can be handled by one-time volunteers
- You have open lines of communication with your volunteers
- You encourage staff to become knowledgeable of local programs for support and assistance
- You seek input from the staff regarding areas of need or improvement

This section helps you focus on the responsibilities toward the staff. It is critical to create and update your staff job descriptions, and to hold scheduled discussions with your staff regarding their duties. Those discussions should not focus on critical job evaluations, but rather should provide for open discussion regarding the needs of the center.

Notes:

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_________________________________________________________
_________________________________________________________

Promotion/Communication

- Yellow Pages ad/listing
- Public banners, posters, signs, etc.
- Congregational notices for bulletins, newsletters, bulletin boards
- Identifiable logo for your Center
- Business cards for counselors and Center Director
- Participation in community events (County Fair, highway clean-up, sidewalk sales)
- Mass Media involvement (public-access cable, local newspaper ads, community bulletin boards)
- Periodic Center newsletter
- Email news service for volunteers and supporters
- Website (understand that many clients know more about the Internet than the Yellow Pages)

This section allows you to evaluate the various avenues of promotion and communication that you have established. In most cases, you will increase your level of interest and support if you become known by a larger audience.

Notes:

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_________________________________________________________

Christian Life Resources - 2006
Fund-Raising

- Established method of requesting and recognizing monetary gifts or gifts-in-kind
- Annual fund-raisers (Run/Walk, Auction, Food Sale, Banquet, golf or bowling outing, etc)
- Unique or one-time fund-raisers (for large purchase, remodel the center, begin new program)
- On-going fund raisers (Baby Bottle Program, direct mail pieces, gifts from regular donors)
- Incorporate matching funds (corporate or individual)
- Congregational budget support
- Publish a Wish List of special needs
- Fund-raising connected to need not simply budget

This section helps the board evaluate their fund-raising efforts and encourages a broad-based effort so the Chapter is not reliant on any single funding source. Strive for variety in fund-raising and recognize the opportunity to use methods that raise awareness as well as funds.

Notes:

Visionary Thinking

- Annual meeting to discuss future planning
- Track Chapter’s history to help determine the future direction
- Focus on big picture (share the Gospel through life issues) - might not include pregnancy tests
- Learn about activities in other Centers for ideas
- Seek input/involvement from national office

This section helps encourage a process that is seldom done in our Chapters. The Board is responsible for current operations, but you must also look at the future periodically. Visionary thinking keeps your enthusiasm for the ministry and keeps you in a leadership role rather than simply a support role.

Notes:

Measurable Effects

- Statistics tracking over a number of years to look for trends
- Statistics can help you identify areas of strength and weakness
- Statistics are beneficial for communicating the effectiveness of your center
- Evaluation of new programs in light of the changes you track in the statistics

Your Center staff tracks a variety of statistics each month and reports those statistics to the national office on a quarter basis. Evaluate those statistics regularly and look for trends that help you identify areas that should be enhanced, added, or dropped from current activities.

Notes:
Supplemental Literature

Increasing Chapter Board Effectiveness

Board Members and Financial Matters
by Julie A. Parton, Ph.D.
At every regular meeting the board should evaluate financial information and update their understanding of the organization’s financial condition.

Financial information should always include a balance sheet and an operating statement (sometimes referred to as an income and expense statement). These financial reports should be presented at each board meeting.

There should be policies concerning the distribution of funds including the signing of checks, expense approval procedures and accounting for operating and designated funds (adequate paper trails).

Charitable contributions must all be properly substantiated.

Reports at every board meeting are the means used to provide Board oversight in the area of finances.

Both state and federal governments require non-profits to file reports and information returns in a timely manner.

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About Board Meetings
by H.B. London, Jr.
While serving in the pastorate for many years, I sat in many, many board meetings. Some of them were exciting, others somewhat depressing. As I reflect back on all those years of leading boards, I have learned a few things that I pass along to you:

- Never enter a meeting without covering it in prayer.
- Be in constant communication with your board in order to sell your vision in less official settings.
- Be willing to compromise on some things. It is not important for you to win on every issue.
- Stay on topic. So many meetings disintegrate when they are allowed to stray off issue.
- When controversy exists in a meeting, be free to ask, “Is this discussion God-honoring; are our attitudes Christ-like?” Don’t hesitate to stop in the middle of an issue to pray.
- Treat every member and their contribution with respect.
- Make sure each member has ample information to make intelligent decisions.
- Remember it’s God’s ministry, not yours; His battle, not yours; His victory, not yours. Go forward!

“For lack of guidance a nation falls, but many advisers make victory sure” (Proverbs 11:14).

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Coaching the Executive Director
by Bruce Cole, MSOD
Most board members would agree that evaluation of the Executive Director is one of the most important, yet most difficult responsibilities of serving on the board. One way to make this experience much more enjoyable and more productive is for the board to assume the role of a coach, rather than a judge.

Larry Bossidy and Ram Charan in their book titled “Execution: The Discipline of Getting Things Done,” say “Good leaders regard every encounter as an opportunity to coach.” They continue by saying, “The most effective way to coach is to observe a person in action and then provide specific useful feedback. The feedback should point out examples of behavior and performance that are good or that need to be changed.”

Executive Directors are hired because of a skill set commensurate with the duties. However, the job of being an Executive Director of a PRC requires many skills that the E.D. may not yet have. Boards who understand their leadership role will observe the ED in the work environment and seek opportunities to provide constructive feedback. As the ED learns that this feedback is not motivated by a desire to criticize but to build skills, learning and growth takes place. This is coaching!

Dr. Anita Schamber of World Vision says that coaching is; based upon a relationship, is about unlocking potential, is a powerful personal transformational tool, and creates a culture of a motivated and empowered staff. Additionally, she says that coaches must always remember that coaching is about the coached- their goals, learning, and growth. It is about learning- rather than teaching. And it is about the entire person, not just their work. Caring, prayerful board members remember these points and seek to build up the ED through the coaching process.

Dr. Schamber also provides a simple model for the board to use as it begins the coaching process. It is called the GROW model of coaching.

Goal – What do you want to achieve?
Reality – What is the current situation?
Options – What choices do you have to do things differently? Which choice is best?
Wrap up – What will you do? By when?

Boards should consider their role as that of a coach. They are not playing the game, nor are they a spectator in the stands. They stand on the sidelines and direct the action. When this process is followed evaluation becomes a much easier and pleasant task, because you have been working together to build one another up all year long.

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Is Your Board Bored?
by Bruce E. Cole, MSOD
Admit it! Sometimes serving on the board can seem like drudgery. Reviewing another financial report, approving the minutes of the last meeting or listening to another staff update may not get your adrenaline pumping. In fact, the thought of your next board meeting may be such a downer that you don't look at the agenda until the last minute.

Bored board members can be hazardous to the health of the organization. If they become too bored, they may create issues or problems just to liven things up; such as becoming involved in micromanagement. Boards are made up of intelligent, forward-thinking, creative people. When their role is reduced to a mundane position of
approvals, filing, reviewing, and nodding of heads, intelligence and creativity will find expression in other less-productive ways.

How can a “bored board” revitalize itself and keep from falling into a destructive pattern? I offer the following suggestions:

**Focus on organizational performance** – Christine Letts, in her book *High Performance Nonprofit Organizations* says, “A board's job is not done until it has led its organization – not just to a clearer sense of its mission – but to better performance.” Effective boards are forward-looking and offer their expertise on how the organization may perform better. This is not exclusively in the areas of financial resources, as many board member think! In fact money is really not an indicator of organizational performance at all! Money is an input towards an expected outcome. It is the role of the organization to convert the money and resources into the expected results or purpose of the organization. A Board's discussion should regularly move towards looking at the impact the ministry is having on the community.

Impact can be measured in a variety of ways, but the constant focus on three questions is the beginning of performance measurement: What good will be accomplished? For whom? And at what cost? Once those questions have been answered, the board can establish performance goals and begin to focus on the effectiveness of the ministry.

**Spend time asking questions** – The greatest value a board member can bring to an organization is the ability to ask the question that no one else has thought of. Board members who come to meetings with questions instead of answers move the organization forward. Questions that lead to better organizational awareness, innovation, discovery, and are externally focused are the sign of true leadership. “Sometimes, leadership differs from non-leadership only that leadership views the world from a slightly wider lens” says John Carver in *Boards that Make a Difference*. Questions are the wide angle lens of the board member. Spend time preparing for your next meeting by asking yourself “What don't I know about…?” and move your board into new levels of excitement.

**Invest in Board development** – Many boards are concerned that if they allocate organizational resources toward themselves they may violate the desires of donors. As a result boards can become stagnate and may get themselves into destructive cycles. Effective boards must invest in themselves. This may mean board retreats, hiring external consultants, or traveling to a conference. This investment is an investment in the capacity of the organization. The organization can only advance as far as the leadership. If the board is uneducated then they will keep the ministry from moving towards excellence.

**Become a Team** – Though much has been written on teambuilding, a common theme is that people are motivated when they feel like they are a part of a team. God created us as relational beings. Board members are recruited because they are decision makers - strong, clear thinking individuals. Sometimes these characteristics can get in the way of building a solid working team. Patrick Lencioni, author of *The Five Dysfunctions of a Team*, says that teams must have trust between members, healthy conflict, commitment, accountability, and a focus on results. As Christian leaders in your ministry, it is imperative that boards fight for these five healthy characteristics:

- Trust is established through a development of relationship with one another. This includes the E.D., who should be a trusted member and contributor to the team.
- Healthy conflict causes us to challenge ourselves to attain new levels of excellence. Consensus is the greatest enemy of leadership, but healthy conflict can only happen when we trust one another.
- As conflict is resolved we get buy-in from all the members of the team. The resolution of healthy conflict creates a “brothers in arms” commitment between team members.
- When people are fully committed to the team they will hold one another accountable. Accountability pushes us towards greatness as individuals, as well as the team.
- Finally, a functioning team will have a relentless pursuit of a collective outcome. This performance becomes a force to propel us to ever higher levels of effectiveness in ministry.
Imagine if every member of your board applied these principles to their role on the board. There would be no room for boredom in the boardroom. Go ahead, take the first step.

*Bruce E. Cole is Manager of Professional Development Services in the Sanctity of Human Life Department at Focus on the Family. He has been Executive Director for two Pregnancy Resource Centers, is a former pastor, and holds a Master's Degree in Organization Development from Central Washington University. Bruce can be reached at bruce.cole@fotf.org*

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**Three Responsibilities for the Board of Directors**

by Gary Barkalow

A viable organization is one which has clear direction, comprehensive plans, skilled staff for each essential task, appropriate technology and adequate funding.

**Clear direction:**
Most non-profits are founded on passion. Passion is what got them started and what keeps them going. Passion is absolutely essential. But passion must be given direction or it amounts to nothing more than raw motivation and unfulfilled desire. In order for an organization to be viable, it must be able to specifically articulate what it exists to accomplish — its mission. A statement of mission is the organization's constitution, marching orders, rallying point. It defines the purpose or niche the organization is trying to fulfill in society and in the God's kingdom. A mission statement should be navigational, not simply promotional. Such a statement answers three questions:

**WHAT IS THE DESIRED RESULT OF ALL OUR EFFORT AND RESOURCES? (OUR VISION)**

**WHO MUST WE WORK WITH TO ACCOMPLISH THIS END? (OUR TARGET AUDIENCE)**

**WHAT MUST WE BE EXCEPTIONAL AT TO ACCOMPLISH THIS END? (OUR CORE COMPETENCIES)**

**Comprehensive plans:** While direction (mission) articulates the organizational calling, plans delineate how we will fulfill this calling. Many organizations find themselves driven by prior neglect or pressing need rather than purpose. The way to overcome this is to first determine what are the critical progress areas in fulfilling the mission. In other words, what are the general areas we must continually be making headway in, where neglect will seriously impair the accomplishment of the mission. Secondly, determine what must be accomplished in the next 90 days in each of those critical progress areas. Thirdly, determine if the complete list of 90 day goals or desired activities can be achieved by the staff. If not, bring the list to a reasonable level. Don't set up the staff for failure. Finally, have the Executive Director report on the past 90 day goals at each quarterly board meeting with goals prepared for the next 90 day period. This is one of the ways a board leads — by enabling productivity.

**Skilled staff for each essential task:** In determining if the list of 90 day goals can be reasonably accomplished, each task must be assigned to a staff person and, in rare occasions, to board members. This exercise quickly reveals if the organization has skilled staff for each essential task. If the organization has multiple staff and yet the majority of tasks continually fall on one person, this may reveal that the others are not properly skilled or not working with clearly defined roles.

The organization's salary and benefit package should be designed to attract good qualified candidates. Don't be cheap — the ideal candidate for the job will be an individual who will be successful in whatever they decide to invest their life in. The "How little can we get by with?" attitude is a recipe for a long term organizational tragedy. Setting up a criterion for hire that anyone can meet is a major mistake. Don't make it!
**Appropriate technology:** Once the organization has a clearly defined mission, it can then determine what technology will maximize its efforts. The emphasis here must be to maximize the staff's work and meet constituent needs. Boards must not resist technological advancement, nor push the organization to use their favorite toys. The board's composite wisdom and perspective is essential here.

**Adequate funding:** When an organization has clear focus, decisive plans and a delivery system for its message or service, it is then in a position of "fundability." Funding must be strategically sought after. You may choose, as an organization, how you will raise funds. Misunderstanding may also result from an inadequate view of scripture. God always responds to our initiatives of faith. In most cases, inaction in fund development is a sign of a lack of faith, rather than dependence on God.

As the fiscal and moral owner of the organization, board members should be "major stockholders." If non-paid insiders who know everything about the organization don't give substantially, why would a casual observer have any confidence to invest?

Board members should not only personally support the organization, but they must also link their friends, acquaintances and co-workers to it as well. For an organization to grow its donor base, it must continually increase its introduction to more and more people. The organization is crucially dependent on board members for this growth.

Even though the responsibility for fund development must be shared by the board and the executive director, somebody must be focused on this task. It's one of those essential tasks which must have staff assigned to it. It may be the executive director or a development specialist. Regardless of who it is, a two year fund raising plan must be developed and implemented, which includes the acquisition of new donors as well as donor cultivation. The principle here is that effective and lasting fund development must be intentional and designed, not random and crisis driven. This is the place where most organizations fall into the crisis trap. Once an organization has entered into a funding crisis, it usually neglects its mission responsibilities. When the funding crisis is lessened, it now enters into a mission crisis because that area has been neglected. As it gets back on track with its mission efforts, the organization has produced once again a funding crisis from prior neglect. Crisis fund raising produces short term donors and staff/board burnout.

Sound financial stewardship must include maintaining the donor data base, developing donor profiles and analyzing giving trends.

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