

# DESIGN YOUR LEADERSHIP STRUCTURE

## SAMPLE PRO BONO PROJECTS

### LEADERSHIP OPPORTUNITIES

STRUCTURE

PEOPLE

CULTURE



#### BOARD STRUCTURE

A board structure project helps a nonprofit outline the right board team for its current needs. The project reviews the roles, organization, and policies of an organization's board and recommends improvements to guide the board in governing effectively. This project may include mapping board roles to strategic goals, outlining desired board composition, or drafting role descriptions for individual board members.



#### ORGANIZATIONAL LEADERSHIP

A organizational leadership project clarifies leaders' roles and responsibilities and maps decision-making authority for operating areas such as goal-setting, budgets, and hiring and firing. This project may include drafting role descriptions with responsibilities and reporting structure as well as creating an organizational chart with communication flows.



#### LEADERSHIP RECRUITMENT

A leadership recruitment project helps an organization figure out where to find and how to attract the right people for key leadership roles. Building a pipeline, writing meaningful job descriptions, reaching out to the right channels, and establishing standards to evaluate candidates are all components of a strong leadership recruitment strategy. This project may include drafting job descriptions for key roles, creating candidate evaluation templates, or designing a recruitment plan.

### GOOD FOR ORGANIZATIONS:

#### IN GROWTH MODE:

Increasing services delivered  
Expanding geographically  
Increasing staff

#### CHANGING SERVICES:

Adapting services to meet new demands  
Terminating services due to budget changes

#### IN NEED OF NEW LEADERS:

Transitioning long-time leaders  
Actively searching for next generation of leaders

### SUCCESS STUDY

A youth-serving nonprofit in Oakland experienced significant growth, expanding from 4 full-time staff to 32 full-time staff over the course of 7 years. When a long-serving Director announced he was leaving, it highlighted the need to reevaluate the existing leadership structure and create a well-defined succession plan. Pro bono consultants created an analysis of the organization's leadership pipeline and drafted a succession policy for the senior leadership team.

*"Our team of experts provided user-friendly templates and a clear framework for our organization to assess where we are currently and demystified the succession planning process."*

# DEVELOP YOUR LEADERS' SKILLS

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#### LEADERSHIP 360 PERFORMANCE REVIEW

A 360 degree performance review project provides senior management with feedback from all their key stakeholders so that they can better understand their strengths and areas for improvement. This project may include interviews and surveys with the board, subordinates, volunteers, donors, clients, and partners. It results in recommendations for areas of improvement.



#### EXECUTIVE COACHING

An executive coaching project provides a leader an opportunity for guided reflection. This external advice can help the leader improve his/her leadership or management performance and development.



#### LEADERSHIP TRAINING ON CORE FUNCTIONS

Building leaders' capabilities can help improve the overall effectiveness of a nonprofit's key functions. Leaders receive targeted training in areas such as financial management, strategic planning, or business development. The project may include a training on terms or terminology and an identification of hands-on learning opportunities.



#### BOARD TRAINING

Once an organization has designed a strong board structure, refined its board role descriptions, and recruited the right people, the next step in healthy board functioning is properly training and continuing the education of board members. A board training project may include a customized training manual for the needs of an organization's board members and a coaching session.

### GOOD FOR ORGANIZATIONS:

#### WITH NEW OR FIRST-TIME LEADERS:

Developing emerging leaders  
Building leadership opportunities for underrepresented populations

#### SEEKING TO FORMALIZE LEADERSHIP DEVELOPMENT:

Striving to best support those in leadership in a cost effective way

#### WITH LEADERSHIP TURNOVER:

Losing talented employees due to lack of growth planning  
Experiencing leadership ineffectiveness

### SUCCESS STUDY

A globally-focused agriculture organization found that many of their team leaders did not have experience in management. And as an international organization, these leaders also needed to be conscious of different cultural environments as part of their managerial skills. A pro bono consultant helped facilitate a series of remote training sessions to build leadership and managerial skills that address this critical need and continues to provide coaching on an ad hoc basis as the organization needs.

# BUILD YOUR IDEAL ENVIRONMENT

## SAMPLE PRO BONO PROJECTS

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#### ORGANIZATIONAL AGILITY AND CHANGE MANAGEMENT

Change, whether driven by internal or external conditions, can be challenging for any organization. This project develops strategies and processes to support the successful implementation of the change using skills training, leadership coaching, and culture adjustment. This project may include a change management strategy and plan, coaching sessions and recommended processes.



#### PROFESSIONAL DEVELOPMENT TRAINING

Professional development is a key component of ongoing leader education and engagement that can maximize an organization's productivity. Leaders receive targeted training in issue areas, changing policies, or new legislation that may affect their work. The project builds leaders' knowledge and creates a culture of ongoing learning.



#### INNOVATION CAPACITY

Innovation is critical for all organizations, yet few believe they are set up to do it successfully. This project can help an organization envision and practice the mindsets needed to make innovation a reality. It may include training on new ways of problem solving like design thinking or new processes like AGILE. It can be coupled with customized hands-on learning opportunities to help leaders solve organizational problems using their newly established methods. The project builds leaders' innovation mindset and creates a culture of curiosity among staff.

### GOOD FOR ORGANIZATIONS

**DOING MORE WITH LESS:**  
Experiencing budget cuts  
Consolidating services  
Merging with other organizations  
Needing new business or revenue models

**SEEKING TO RETAIN AND EFFECTIVELY ENGAGE STAFF**  
Experiencing turnover or low engagement among staff

**IN GROWTH OR TRANSITION:**  
Adapting or expanding services  
Responding to new or changing needs among constituents

### SUCCESS STORY

A youth-serving organization in the Bay Area was in search of HR talent to audit their employee handbook. As community organizers, the organization wanted to ensure the handbook reflected their values and policies. And as they evolve their policies to meet digital standards, it was critical to ensure these policies were clearly outlined for staff in the material. A pro bono consultant helped this organization address some of the areas of concern regarding current policies and updated other areas of the handbook to better reflect the core values they seek to ensure every employee represents.

# DEVELOP LEADERSHIP EQUITY

## SAMPLE PRO BONO PROJECTS FOR DIVERSITY & INCLUSION GOALS

### WHY IT CAN HELP:

- Foster organizational cohesion among staff by increasing cultural awareness
- Hold board and senior leaders accountable for equitable practices
- Invest in the success of first-time leaders by providing critical development opportunities

### SAMPLE PROJECTS:

#### STRATEGIC PLAN WITH A RACIAL EQUITY FOCUS

A strategic plan with racial equity focus project helps an organization better integrate equity into its processes, policies, and practices. It includes leadership and board training and coaching in order to identify underlying biases and influence behavior.

#### NEW LEADER DEVELOPMENT PLAN

Increase satisfaction and effectiveness by creating a professional and management development plan for your first-time leaders. Customized to new leaders' needs, these development plans can include training on core functions of the organizations or key management skills such as communication, delegation, or time management.

#### NEW LEADER COACHING

Outside support can help first-time leaders succeed. External advice provides a space for self-reflection and can help a new leader improve his/her management performance and effectiveness.

### SUCCESS STORY:

Homeboy Industries provides hope, training, and support to previously incarcerated and formerly gang-involved men and women, allowing them to redirect their lives and become contributing members of the community. Approximately 30% of their Senior Staff has never worked in traditional company before. Staff are smart and driven individuals but needed formal training, guidance, and coaching as first-time managers. Pro bono consultants advised Homeboy Industries on how to implement and track goal setting and performance management in their unique culture. This advice helped create a formal structure of support for Homeboy Industries' new leaders.

# BUILD LEADERSHIP DIVERSITY

## SAMPLE PRO BONO PROJECTS FOR DIVERSITY & INCLUSION GOALS

### WHY IT CAN HELP:

- Increase your organizational strength and productivity.
- Make your organization more attractive to potential hires from a range of backgrounds, opinions and perspectives.

### SAMPLE PROJECTS:

#### ORGANIZATIONAL DIVERSITY PLAN:

An organizational diversity plan builds a diversity strategy team and plan to create strategic, long-term success through diversity initiatives. A successful diversity plan integrates diversity as a critical piece of the mission, vision, values, and daily strategy of the organization.

#### BOARD DIVERSITY PLAN:

A board diversity plan helps a nonprofit outline the right board team for its specific needs and develops the marketing tools and outreach necessary to bring in a range of qualified candidates. It may include an inventory of current skills and competencies, the identification of new outreach channels, and a training for current board members.

### SUCCESS STORY:

Community Partnership for Families of San Joaquin (CPFSJ) helps families achieve financial stability and self-sufficiency. The organization's staff includes members from the local community to ensure cultural competency and alignment with community values. CPFJS wanted to identify practical ways to bridge divisions between staff members from different offices without compromising the unique perspectives each group brings to their work. They needed strategy for fostering cohesion and inclusivity within the organization's geographically, racially, and socio-economically diverse staff. Pro bono consultants helped CPFSJ create an overall strategy for developing a cohesive organization and identified a series of tactics to get started.