

I work with nonprofits in exactly this type of Board assessment and restructuring work, and I've implemented several assessment tools and frameworks as both a consultant and an active Board member on Executive Committees for local organizations.

Here's how I typically approach a project like this:

Timeline & Approach (5–6 months)

- **Months 1–2: Assessment Phase**
 - Review existing governing documents and other relevant materials for ED review and evaluation.
 - Conduct an initial meeting with project leads to clarify priorities.
 - Design a Board / org assessment and survey tool.
 - Conduct 1:1 or small group interviews as needed to gather additional insights once the assessment and survey are shared with and completed by relevant parties.
- **Month 3: Drafting Governance Documents**
 - Update or create Board role descriptions, committee descriptions, and governing bylaws as needed.
 - Update or create ED review and evaluation process
 - Prepare accompanying tools to support Board development and restructuring.
- **Month 4: Sharing Tools & Draft ED Evaluation Approach**
 - Present draft governance tools and ED evaluation approach for review.
 - Organization has time to provide feedback before a final debrief.
- **Month 5–6: Final Debrief & Follow-Up**
 - Deliver a final recommendation report and hand off all materials.
 - Conduct a general check-in to see how tools and processes have been implemented and address any follow-up needs.

Format & Fees

- Work can be done virtually, unless there's a preference for in-person meetings, which can be accommodated with additional travel fees.
- A project like this typically starts at \$4,000 and may increase if additional travel, meetings, or deliverables outside the agreed scope are requested.

I'd be happy to answer any questions outside of this outlined approach or discuss any specific priorities CDA would like to focus on.