



## Services/Price List for 2018

*Each project is customized to meet the client's unique needs. The following descriptions and prices are starting points for "standard" projects and may be adjusted by mutual agreement during the project design and contracting process. Please call Cathy at 321-848-7320 to get started!*

### **Board Development**

**On-Site Training.** Bring the Board Doctor into your boardroom to deliver a one-on-one workshop for board members, volunteers, and staff:

- Roles and Responsibilities of Board Members
- Building a Great Board: Recruiting, Engaging and Keeping Board Members
- Strategic Planning That Sticks
- Bylaws and Other Policies
- Others as requested

\$250 for 1-3 hour presentation within 50 miles of Brevard County; more with travel

**The Board Doctor's Annual Check Up.** Organizations need annual checkups too! This 100-item Governance and Best Practices Checklist provides the criteria on which to self-assess the board's functions. Transitioning or new organizations may want to work on the basics like mission and vision, or strategic planning. Others may want to work on fiscal oversight or fundraising. Board members complete the Checkup confidentially via an online "survey." For \$500 The Board Doctor will compile results and provide a report with recommendations. To get that plus a presentation of the results in the boardroom and facilitation of discussion about what, if anything, to address: \$750.

**Retainer Services for Longer Engagements.** Sometimes groups need a knowledgeable partner standing by their side for a longer period of transition to assist with recruiting and orienting board members, organizing board meetings, getting the board on track, or reviewing, revising, drafting, and explaining all manner of board policies from bylaws, to financial checks and balances, to Conflict of Interest statements and more. Engagements can last from 3 months up to 12 and cost between \$500 and \$3000 per month depending upon the level of assistance needed.

### **Strategic Planning**

*Consultants must get to know an organization prior to facilitating a planning meeting so that we understand the various perspectives on important questions (What is working and not working? What vision do we have for the future?) Full pre-meeting preparation allows the group to engage in "brainstorming" its options, saving time at the meeting for discussion and decision-making.*

**Minimal Planning Preparation.** Board members complete The Annual Check Up online. Board, staff and key volunteers – anyone who will be invited to the planning meeting - answer a series of pre-planning questions online or via email. The board president and executive director provide telephone interviews to outline their goals for the organization. \$1000 for up to 25 people; more for bigger groups.

**Full Planning Preparation.** Board members complete The Annual Check Up online and are available for follow up questions. Anyone who will be present at the planning meeting provides a 30-minute pre-planning interview to the consultant. The organization provides the consultant with copies of bylaws, board handbook (or key organizational policies), current budget and financial statements, and any current grants or other contracts that include requirements the organization must fulfill. There is an option to include member or customer surveys, focus groups, or interviews. Cost may range from \$1500-\$5000 depending upon the project design and the number of people involved.

## **Strategic Planning, cont.**

**Half-Day Retreat.** Design agenda and prepare to facilitate a special 4-5-hour meeting of board, staff and key stakeholders to (typically) affirm, refresh or revise the mission, establish a clear vision, determine key strategic priorities, and identify short-term objectives, including next steps to complete the planning process. \$750 includes a complete set of meeting notes.

**Full-Day Retreat.** Design agenda and prepare to facilitate a 7-8-hour retreat as above, with more time given to co-crafting specific goals and objectives or focusing on a specific area such as board development or fundraising planning. The longer format can also include time for a specialized workshop (such as on roles and responsibilities of board members) and/or opportunities for participants to get to know each other better. \$1250 includes a complete set of meeting notes.

**First Plan Draft.** Few things are less likely to be implemented than a consultant-written plan; however, it can be helpful for the consultant to provide a first draft – taking material from the planning meeting and making some initial choices to fit the puzzle pieces together. This involves determining which items from the priority to-do list are longer-term goals and which are nearer-term action items that support those goals. Plan drafts might be the overarching strategic plan or drop-down plans such as for board development, fundraising, marketing, etc. \$500 - \$1000 depending upon level of complexity desired.

## **Other Services**

**360-Degree Evaluations.** A 360-Degree Performance Evaluation is a way to seek confidential input from people all around us at work—supervisor, peers, and direct reports. The outside consultant collects and analyzes their evaluations and then reviews the information with the person being evaluated, helping them understand how they are perceived by others. Big learning takes place when we see the specific items where our perception of ourselves differs from what others see. We can then take steps to do more of what people like—and less of what they don't. Categories include personal trustworthiness, mastery of job-related skills, leadership ability, and more. (Note this is a professional development service that does not take the place the board's evaluation of its CEO.) \$400 for up to 25 evaluators.

**Interim Executive Director Positions.** Cathy is available as an interim executive director for organizations within a 50-mile radius of Melbourne, Florida that are transitioning from one director to another, or preparing for a first-time executive director. Services include any and all of the following for a period of 6 weeks to 12 months, as needed, and are priced accordingly. (\$500 to \$1500 per week.)

- Handling day-to-day operations
- Assessing organizational needs: board, staff, volunteers, financials, programs, partnerships
- Advising the board about next steps
- Facilitating strategic planning
- Preparing the organization for a permanent executive director (develop position description, draft human resources policies, assure legal compliance, etc.)
- Staffing out the executive director search process
- Assisting with orienting/onboarding the new hire



The Board Doctor, LLC is owned and managed by Cathy Allen, an experienced nonprofit professional with a Certificate in Nonprofit Board Consulting from BoardSource. More information is available online at [www.TheBoardDoctor.info](http://www.TheBoardDoctor.info) and through LinkedIn, Facebook, and Twitter. Call Cathy directly at 321-848-7320 or email [Cathy@TheBoardDoctor.Info](mailto:Cathy@TheBoardDoctor.Info).