



# Across the Board

## The easy way to review and appraise your Board of Trustees

- Identify and meet Board members' individual and collective learning and development needs
- Improve the way your Board communicates, collaborates, and works as a team
- Enhance the leadership from your Board so that it operates more strategically and makes better decisions
- Meet the NHF Code of Governance requirements (for Housing Associations) and Charity Commission requirements

## Why?

Housing Associations and charities are required to **undertake regular reviews of the effectiveness of their Board**. For example the NHF Code of Governance specifies that a full and rigorous appraisal process for individual members of the Board and its committees must be carried out *at least every two years*. It also notes that all Board members must receive ongoing learning and development during their tenure.

We believe that a Board review **should be a meaningful process** and not just a tick box exercise. Doing it properly benefits individual Board members and the Board as a group, making the organisation as a whole more successful. The benefits of our **Across the Board** approach include...

- Individual Board members feel valued and invested in and have opportunities for professional development and personal growth
- Individual members are more skilled and knowledgeable and contribute more to the Board as a whole
- Board members understand each other better, relationships become stronger, communication improves and people collaborate more
- Board members become more inspired, energised, and motivated
- Succession plans can be implemented to ensure that Board members are ready to fill officer roles as they become vacant
- The Board has a framework to help it look at projects, activities, plans and decisions from diverse perspectives in order to operate more effectively and efficiently
- The capacity of the Board and the organisation as a whole is boosted
- Board members become better leaders and the Board becomes a more effective leadership body

In an increasingly VUCA (volatile, uncertain, complex and ambiguous) world, the challenges for charities and Housing Associations are growing and it is becoming more and more important to invest in the Board and to develop their leadership capacity. Our **Across the Board** process will help you to do this and will put the foundations in place for a highly skilled and effective Board and a strong and successful future.

*“Saltbox completed a holistic review of our board’s all-round effectiveness, and appraised and coached individual members to help them identify their development needs and realise their potential. The interactive workshop combined with the data gathered on individual performance has enhanced the Board’s effectiveness and ability to steer the Society strategically. I would highly recommend the Saltbox approach.”*

Donna Johnson, Chief Executive, South Western Housing Society

## How?

We make life easy for you by managing the whole process, using our **Across the Board** methodology for reviewing and appraising Board performance. This helps you to identify and develop individual Board members' knowledge and skills as well as looking at the efficiency and effectiveness of the Board as a whole. The process involves 5 key stages:

### 1. Competencies

If you already have a set of competencies for Board members, we'll use these to conduct the individual appraisals. If you don't already have competencies in place, we'll help you draw up a set that works for you, or you can use our own generic set of Board member competencies and behaviours.

### 2. Appraisals

We co-ordinate individual 360° feedback for each member of the board. This involves creating an appraisal questionnaire based on the Board member competencies and behaviours, helping you to decide who will be invited to provide feedback on individual Board members, and then managing an online facility to collect feedback from respondents and create individual reports for each Board member.

### 3. One-to-one coaching sessions

We conduct a 90-minute one-to-one coaching session for each appraisee to help them understand the information in their appraisal report, discuss what this tells them about themselves and the impact they have on the Board and the organisation as a whole, and to identify actions for their individual development plan.

### 4. Group Workshop

We facilitate a half or full day workshop which will look at how well the Board works as a team, improve communication and collaboration, and make the most of the diverse behaviour and communication styles in the group. We'll use TetraMap® as a framework to promote mutual understanding and trust, and to look at issues from 4 different perspectives in order to evaluate and review activities and projects, make effective decisions, and develop plans and strategies.

### 5. Final Report

At the end of the process, we provide you with a final report which summarises the findings and makes clear recommendations for action, and if you wish us to, we'll also attend a Board meeting to present and discuss the process and its findings with you.

## What?

Here's a bit more information about some of the tools we use for your Board appraisals and review:

### 360° appraisals

A 360° appraisal collects feedback on performance from both the appraisee and those around them. When conducted well it is a powerful and effective tool for identifying the competencies required for the organisation's success and then reviewing and improving individual performance against these.

Each Board member conducts their own self-assessment against the required competencies, and feedback is also requested from an agreed number of people who work with the Board member, such as Executive Team and other staff members, fellow Board members, stakeholders, or tenants. This approach gives each Board member a real insight into how different groups or individuals see and experience them, and helps to foster self-awareness, highlight strengths, and identify areas for improvement. This information is then used to draw up a development plan for each Board member.

The appraisals also enable Board members to consider how their behaviour impacts on the organisation as a whole, and when combined with the group workshop, help to identify key areas for collective development.

### TetraMap®

[TetraMap](#) is a simple but powerful tool which helps individuals, teams and organisations to enhance their performance. It improves communication, collaboration, and leadership, and helps organisations to solve business challenges by giving people a common language and by providing a useful, practical framework for exploring issues from different perspectives in order to make decisions and plan strategies.

TetraMap uses nature as a metaphor to describe different behavioural preferences, communication styles, and perspectives. In the group workshop, each Board member completes their own TetraMap profile. We use this to explore their individual preferences and the impact of these on others, as well as looking at the profile of the board as a whole and how this shapes the way that it works. Using TetraMap helps the Board become better leaders and to be more effective as a team.

***“TetraMap brings the ancient wisdom of the elements into a powerful framework for personal and organisational development. It is a way to harness the power of our natural abilities, build on strengths and enable everyone in the team to reach their potential. Using the four elements as a way to understand myself and the organisation has deepened my understanding of good leadership and given me a powerful tool for the future.”*** Angie Burke, Trust Manager, The Resurgence Trust

## How Much?

The total cost varies depending on factors such as how much we tailor the package to your specific organisational needs, how many Board members you have, and whether other people, such as the Executive team are included in the process. It typically ranges from £6,500\* for a basic package for 10 Board members to £15,000\* for a bespoke programme for up to 20 people.

\*Plus VAT and expenses

**Please contact us to discuss your own organisation's requirements and we'll provide you with a detailed quote.**

## Get in Touch

Contact **Nicki Davey**, Director of Saltbox Training & Events to find out how we can use **Across the Board** to help you to appraise and review your Board of Trustees.

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