# Option 2: Board Retreat Read-and-Reflect Worksheet

*Great boards read at least one book a year to improve their governance competencies!*

# 2020 Board Retreat

## XYZ Ministry

**Read-and-Reflect Worksheet**

**MEMO**

**DATE:** May 1, 2020

**TO:** Board of Directors

**FROM:** Jane Doe, Board Chair

**RE:** Preparation for Board Retreat

We are prayerfully looking forward to meeting with all of you at the 2020 Board Retreat. We want our time together to reflect the heart and spirit of Henry Blackaby’s memorable comment, “Find out what God is doing…and then join Him.”

This worksheet is designed to get everyone thinking in advance. We urge you to invest time in prayer and preparation BEFORE the board retreat. Please note this wisdom from Peter Drucker:

## “The best way to predict the future is to create it.”

Peter Drucker

## Reading Assignment

You have received the book, *Peter Drucker’s Five Most Important Questions*, by Peter Drucker, Frances Hesselbein, and Joan Snyder Kuhl. We’ll dig deep into this resource. And we’ll heed this reminder, also from Peter Drucker: **“Plans are only good intentions unless they immediately degenerate into hard work.”**

Drucker also said that “we now accept the fact that learning is a lifelong process of keeping abreast of change. And the most pressing task is to teach people how to learn.” So…what can we learn that will help us with board governance?

A “Read-and-Reflect Worksheet” is attached to this memo. After you’ve read the book, please jot down your thoughts and then bring the worksheet with you to the board retreat. Thanks! We’re looking forward to seeing how God will lead you in this process.

* **Why is this important?** James M. Kouzes and Barry Z. Posner note in *The Leadership Challenge*:

## “Leaders must challenge the process because systems will unconsciously conspire to maintain the status quo and prevent change.”

**Read-and-Reflect Worksheet**

 **XYZ Ministry • 2020 Board Retreat**

➞Please bring the book and the worksheet with you to the Board Retreat

Peter Drucker on **Self-Assessment**:

“**Self-assessment** is the first action requirement of leadership: the constant resharpening, constant refocusing, never really being satisfied.”

“The **self-assessment** process is a method of assessing what you are doing, why you are doing it, and what you must do to improve an organization’s performance.”

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| **Reading Options** | **2 Options:**☑ Option 1. Read the entire book (and the commentary on each question)— and you may win a Chick-fil-A card! You’ll especially enjoy the interesting color commentary by millennials in each chapter.☑ Option 2. Read just Peter Drucker’s comments on the five questions (less than 35 pages).* Why Self-Assessment? (pages 1-6)
* Question 1: What Is Our Mission? (pages 7-11)
* Question 2: Who Is Our Customer? (pages 19-23)
* Question 3: What Does the Customer Value? (pages 35-38)
* Question 4: What Are Our Results? (pages 47-52)
* Question 5: What Is Our Plan? (pages 61-68)
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| **Introductory Critical Questions:** | **Peter Drucker makes a very strong statement at the beginning of the book** (page 2). ***Do you agree with him?***Although I don’t know a single for-profit business that is as well managed as a few of the nonprofits, the great majority of the nonprofits can be graded a ‘C’ at best. Not for lack of effort; most of them work very hard. But for lack of focus, and for lack of tool competence. I predict that this will change, however, and we at the Drucker Foundation [now the Frances Hesselbein Leadership Institute] hope to make our greatest impact in these areas of focus and tool competence. |

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| Question 1: **What is our mission?** | Our organization’s mission is to… |

Is it time to re-visit our mission statement? Measure our mission statement against this “Top-10 List” below:

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| **Top-10 Ingredients That Create an Eloquent and Arresting Mission Statement[[1]](#footnote-1)****Our mission . . .** | **Yes!****Absolutely!** | **To Some Extent** | **Not at All** |
| 1. Is short and easily focused. |  |  |  |
| 2. Is clear and easily understood. |  |  |  |
| 3. Defines why we do what we do, why the organization exists. |  |  |  |
| 4. Does not prescribe means. |  |  |  |
| 5. Is sufficiently broad. |  |  |  |
| 6. Provides direction for doing the right things. |  |  |  |
| 7. Addresses our opportunities. |  |  |  |
| 8. Matches our competence. |  |  |  |
| 9. Inspires our commitment. |  |  |  |
| 10. Says what, in the end, we want to be remembered for. |  |  |  |
| **Bonus Question:**Does our mission statement ...fit on a t-shirt? |  |  |  |

## MISSION:

**Skip LeFauve:** “Having a well-defined mission gives leaders a way to resolve competing interests and make better decisions.”[[2]](#footnote-2)

**Frances Hesselbein:** “Revisit the mission every three years, each time refine or amend it so that it reflects shifts in the environment and the changing needs of the customers.”[[3]](#footnote-3)

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| Question 2:**Who is our customer?** | Peter Drucker distinguishes between “primary” and “supporting” customer and says that your primary customer is “the person whose life is changed through your work.”In your opinion, who is our primary customer? |

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| Question 3:**What does our customer value?** | Research is a key part of discerning what our customers value. What would you like to know about our primary customer that we don’t know today? |

1. These 10 questions are adapted from Peter Drucker, *The Five Most Important Questions Self-Assessment Tool: Participant Workbook and Leader to Leader Institute* (San Francisco: Jossey-Bass, 2010), 12. [↑](#footnote-ref-1)
2. Skip LeFauve quoted in the “Leadership Tip of the Day” email from the (now-named) Frances Hesselbein Leadership Forum, June 1, 2010, [*www.HesselbeinForum.org*.](http://www.HesselbeinForum.org/) [↑](#footnote-ref-2)
3. Frances Hesselbein quoted in the “Leadership Tip of the Day” email from the (now-named) Frances Hesselbein Leadership Forum, October 2, 2010, [*www.HesselbeinForum.org*.](http://www.HesselbeinForum.org/) [↑](#footnote-ref-3)