Welcome to the Webinar

We will begin at 10:00am (PT)

A recording will be available after the webinar.

Your line will be muted to cut down on background interference so please use the chat box to share your name, your organization, your location and any questions you have for our featured speakers.
Supporting Organizational Sustainability (SOS Institute)

Presents

Assembling the Puzzle: Strategic Tools to Build an Effective Board

Tuesday, April 26, 2016

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Presenters

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Objectives

As a result of this webinar, participants will be better able to:

1. Identify key strategies and best practices to build an effective board of directors.
2. Develop actionable strategies for retaining and effective board of directors.
Poll question #1

What is your role at your organization?

a. Executive Director
b. Program Staff
c. Board member (past, present, or future!)
7 Steps to Success

- Assessment
- Getting ready to grow/deepen
- Recruitment
- Onboarding
- Building connections
- Getting on the same page
- Best Practice—institutionalizing the work
Step 1: Assessment

- What skills are needed?
- Do members fit with your mission?
  - Community-based groups
  - Survivor-centered
- Be aware of tokenism
Poll question #2

Does the Board of Directors at your organization engage in strategic planning/thinking?

a. Yes
b. No
c. I don’t know
Step 2: Getting Ready to Grow

1. The importance of a strategic plan/strategic direction
2. What to do with inactive members
3. Founders syndrome
Step 3: Recruitment

1. Developing a thoughtful—not cumbersome—process. What do you need?

2. Expectations

3. Circle exercise
Circle Exercise

- Identifying individual donors, potential partnerships, potential board members
- Put yourself in the middle
- Add people closest to you in the next circle, continue to add
Step 4: Onboarding

1. Board buddies

2. How to talk about expectations

3. Fundraising—expectations
Step 5: Building Connections

1. Board/staff relationship and responsibilities
2. Community relationships
3. Elevator speech—talking to constituency
4. Successful committees
10 Basic Responsibilities of Non-profit Boards

- Determine mission and purpose.
- Select the chief executive of the organization.
- Support and evaluate the chief executive.
- Ensure effective planning (high level).
- Support and strengthen programs and services.
10 Basic Responsibilities of Non-profit Boards

- Ensure adequate financial resources.
- Protect assets and provide financial oversight.
- Build a competent board.
- Ensure legal and ethical integrity.
- Enhance the organization’s public standing.
Step 6: Getting on the Same Page

• Scope of work for the year

• How does the Board and its members support and training for success?

• Board Briefings

• Board Learning
Example--Workplans

• The importance of work planning for an effective board of directors
• To effectively plan, we need to know where we are today (what is real now), where we are going (vision, mission) and when we have arrived.
• SMART goals
Step 7: Best Practice: Institutionalizing the mission

- Fundraising expectations
  - Mission-based
  - Adaptive to your community

- Officers and succession planning

- Varied board terms, term limits
Step 7: Best Practice Continued…

- Board meeting tips
  - Responsibilities: budget, annual review of the Executive, audit approval, review financials
  - Board learning—mission moments

- Committees

- Other practical tips for engagement
Toolkit

- Engaging the Board
  [http://www.nonprofitresourcenetwork.org/resources/engageboard.php](http://www.nonprofitresourcenetwork.org/resources/engageboard.php)
- A Board Member Contract
  [http://www.blueavocado.org/content/board-member-contract](http://www.blueavocado.org/content/board-member-contract)
- Fundraising, A Partnership Between Board and Staff: 10 Things Every Board Member Needs to Know
Questions and Answers

Please take a moment to take a short evaluation regarding today’s webinar and future webinars.

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