boards in gear

1. connection to cause
   - explain your role in raising funds for your organization.
   - identify the information and resources you have for fund development.
   - describe where you fit in the process for engaging potential donors.
   - explain why you give.
   - tell a story of how you have engaged new people in the organization's growth.

2. responsibilities
   - describe why board members care about your mission.
   - name the organization's stakeholders.
   - talk about the budget and 990 review process.
   - describe how the board adds value to programs and services.
   - bring finance unlocked for nonprofits (fun) to an upcoming board meeting.

3. competition & development
   - describe how the board supports and supervises the executive director.
   - describe how board decisions get made.
   - describe how the board supports and supervises the executive director.
   - describe the role of the executive director on the board.
   - describe the role of board members in community diversity.

4. board operations
   - regular, effective board meetings advance your mission.
   - committees can make the board more efficient, effective, and strategic.
   - clear roles between board and staff locate everyone on the mission.
   - strong boards evaluate, practice, and learn.
   - here's what you've held a board membership.

5. fundraising
   - articulate how your mission connects to your cause.
   - articulate how board members were ambassadors for the organization.
   - describe how board members have engaged key community decision makers.
   - talk about what leadership means to you.
   - describe how you partner with another organization.

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**CONNECTION TO CAUSE**

**Why It Matters**
- It gets to the core of your existence—what you exist to change.

**Key Tools**
- Up-to-date communications tools for the organization

Map all of the players who have a stake in your work. Get to know them better.

Bring conversation about the context of your work into your board meetings. Ask “why does it matter?” at the right times.

Develop a deeper understanding for your work, including what makes your organization needed at all.

Explore concepts of leadership: what it means to lead an organization, what it means to lead a cause.

**RESPONSIBILITIES**

**Why It Matters**
- They provide the oversight an organization needs to grow its mission and protect its assets.
- They make intentional decisions that respond to new opportunities or threats.
- They steward the organization on behalf of the community, which is entrusting them with resources to make a difference.

**Key Tools**
- IRS Form 990
- Washington Secretary of State communication
- Conflict of interest policy
- Job description
- Commitment form

Discuss Duty of Care, Loyalty, and Obedience and what they mean to your board.

Get your compliance act in gear, putting key dates on your organizational calendar.

Talk about your mission and how well it is being achieved through your programs. Create a dashboard of two or three key metrics.

**COMPOSITION & DEVELOPMENT**

**Why It Matters**
- It can better provide the oversight its organization needs to grow its mission and protect its assets.
- It has the right people with the right tools in place to respond to new opportunities or challenges.
- It can bring the community into its membership.

**Key Tools**
- Job descriptions
- Board matrix
- Self-assessment
- Rotation policies
- Orientation schedule
- Calendar

Create a calendar that maps out recruitment, orientation, learning, and mentor activities.

Establish a Board Development Committee.

Tie board recruitment to your planning. Determine what kind of people you need to succeed in the next three years.

**BOARD OPERATIONS**

**Why It Matters**
- It has the space and structure in place to provide the oversight an organization needs to grow its mission and protect its assets.
- It makes intentional decisions that respond to new opportunities or challenges.
- It can better steward the organization on behalf of the community, which is entrusting them with resources to make a difference.

**Key Tools**
- Meeting agenda
- Committee descriptions
- Strategic plan

Look at your meeting agendas. How much time is spent on the past versus the future?

Gauge whether your board meets too frequently or too infrequently to get its work done. Think about how committees play into this.

Talk about the relationship between board and staff (or lead volunteers if you have no staff).

**FUNDRAISING**

**Why It Matters**
- It ensures that fundraising is conducted in an ethical, professional manner.
- It provides the resources needed for the organization to be strategic in how it fulfills its mission.
- It expands the community supporting the mission, bringing a larger set of individuals into the cause in which it operates.

**Key Tools**
- Case for support
- List of current donors and/or members
- Budget
- Fundraising plan

Describe the many ways that board members can be involved in the fundraising cycle.

Look at the organization’s diversification of funds and build out a plan that keeps them diversified.

Build into the board experience (meetings, events, etc.) time for storytelling.

**INSTRUCTIONS**

Get In Gear, Spark Conversation, Roll To Win!

Brought to you by Washington Nonprofits, Boards in Gear was designed to make learning fun as we deliver on a simple premise: that strong boards make strong nonprofits. All you need is a willing team of board leaders and the dice, and a desire to learn how to become a stronger board on behalf of your mission.

Simply “roll to win”—each section of the gear graphic is designed to spark conversation about one of the five key areas of board leadership. Roll the dice. Choose one Show statement and answer it. If you roll a six, then you’re in luck—you can choose which area you want to explore and discuss with your team.

Boards In Gear will ignite learning in ways that open possibilities for your board. Ready to roll? Let’s play!

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