



# Engaging Your Board is More Important Than Ever!

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BOARD2BOARD FRISCO  
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**FOUNDATION** *Innovation*  
inspiring communities to engage in public education



# Board Development

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# What are you seeing with your Board?

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# Are Expectations Set

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## **Best Practice - Individual Board Member Responsibilities**

- Attend all board and committee meetings and functions, such as special events.
- Be informed about the organization's mission, services, policies, and programs.
- Review agenda and supporting materials prior to board and committee meetings.
- Serve on committees or task forces and offer to take on special assignments.
- Make a personal financial contribution to the organization.
- Inform others about the organization.

# Sustainability

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- Diversity, Equity and Inclusion
- Suggest possible nominees to the board who can make significant contributions to the work of the board and the organization
- Keep up-to-date on developments in the organization's field.
- Follow conflict of interest and confidentiality policies.
- Refrain from making special requests of the staff.
- Assist the board in carrying out its fiduciary responsibilities, such as reviewing the organization's annual financial statements.

# Responsibilities

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## BOARD

Volunteer leaders are responsible for the **DIRECTION** of the organization. The board governs, develops policy, and sets a course. The mission statement should frame all discussions and avoid micromanagement. Four board functions:

Governance and Fiduciary

Policy and Position Development

Visionary - Future Focus

## STAFF

Staff are responsible for **ADMINISTRATION** of the organization. Staff partner with the board to advance goals and strategies, while taking care of the daily administrative needs unique to nonprofit organizations.





# Appreciation, Engagement and Team Approach

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Empower  
Memorable Onboards  
Lively Board Meetings  
Task Force Involvement



# Succession Plan

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Are board members/board composition evaluated based on skills and talent that will accommodate the Foundation's future leadership needs?

Define the Role: Responsibilities, Criteria, Performance Goals

Board Succession Planning Grid

Don't rely on luck

# Sample Succession Planning Grid

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Office	Current Officer	Potential Successors	2022	2023	2024	2025
President	Monica Geller Until 2020	Ross Geller	Monica	Monica	Monica	Ross Geller
VP Dev.	Chandler Bing Until 2019	Janice or Emma	Chandler	Chandler	Janice or Emma	Janice or Emma
VP Fin/Gov	Ross Geller Until 2020	Mike Hannigan	Ross	Ross	Ross	Mike Hannigan
VP Mark/Ev	Rachel Green Until 2018	Unknown	Rachel	Unknown	Unknown	Unknown
VP Prog	Joey Tribbiani Until 2019	Unknown	Joey	Joey	Unknown	Unknown
Secretary	Phoebe Buffay Until 2019	Gunther or Unknown	Phoebe	Phoebe	Gunther or Unknown	Gunther or Unknown

# And now...

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## Board Fundraising!

# Key to Effective Fundraising

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Nonprofit leadership and  
board member  
participation



# Celebrate Wins

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A word cloud featuring various terms related to team engagement and collaboration. The words are arranged in a cluster, with 'engaged' being the largest and most prominent at the bottom center. 'teamwork' is also large and positioned above it. Other words include 'team', 'committed', 'attentive', 'involved', 'support', 'passion', 'boardmembers', 'understanding', 'enthusiasm', 'partner', 'passionate', 'intention', 'engage', and 'pledge'. The colors of the words are primarily shades of green, yellow, and orange, with some words in dark red.

team  
involved committed attentive  
support teamwork  
passion  
engaged  
boardmembers understanding  
enthusiasm partner passionate  
intention engage pledge