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Board Enlistment Planning Worksheet



Board Enlistment Planning Worksheet

SKILLS NEEDED ON THE BOARD (BRAINSTORM):

QUALIFICATIONS:

- | | |
|---|--|
| <input type="checkbox"/> Conviction for the mission | <input type="checkbox"/> Specific expertise (accounting, law, marketing, etc.) |
| <input type="checkbox"/> Current supporter of the mission (time, talent, money, etc.) | <input type="checkbox"/> _____ |
| <input type="checkbox"/> Ranks the organization in their top 3 philanthropic priorities | <input type="checkbox"/> _____ |
| <input type="checkbox"/> Willing to introduce their networks | <input type="checkbox"/> _____ |
| <input type="checkbox"/> Participate as an impassioned volunteer | <input type="checkbox"/> _____ |

PREPARE BOARD NOTEBOOK:*

- | | |
|--|--|
| <input type="checkbox"/> Brief overview of the organization (mission, history, values) | <input type="checkbox"/> Strategic plan and/or yearly goals |
| <input type="checkbox"/> Staff organizational chart | <input type="checkbox"/> Development plan |
| <input type="checkbox"/> Board member job description: role, responsibilities, and term commitment | <input type="checkbox"/> Approved budget |
| <input type="checkbox"/> Bylaws and policies | <input type="checkbox"/> Recent monthly financials |
| <input type="checkbox"/> Board member roster and contact information | <input type="checkbox"/> Most recent audited financial statement |
| <input type="checkbox"/> Board committees, purpose, and members | <input type="checkbox"/> Board member agreement for signature |
| <input type="checkbox"/> Board meeting schedule | <input type="checkbox"/> _____ |
| <input type="checkbox"/> List of other important dates for the organization | <input type="checkbox"/> _____ |
| | <input type="checkbox"/> _____ |

* Can be hard copy or digital folder (Google Drive, Dropbox, etc.)

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POTENTIAL BOARD CANDIDATES (BRAINSTORM):

ENLISTMENT TEAM:

Enlistment Training Date: _____

Materials Needed:

- Brief overview of organization (mission, history, values)
- Board member job description: role, responsibilities, and term commitment
- Enlistment proposal letter

ENLISTMENT PLAN:

Board Candidate: _____

Enlistment Team Member Assigned: _____ Face-to-face Meeting Date: _____

ONBOARDING:

Face-to-face Meeting with Board President and Executive Director Date: _____

Formal Onboarding / Training Date: _____

Training Agenda and Speakers:

- Introductions
- Organization overview, video and/or tour
- Executive Director shares vision for the organization
- Board President reviews roles and responsibilities
- Development leader gives fundraising overview
- Board President outlines next Board meeting