

# THE ELEVATOR Insiders

Volume 1 Issue 8: December 2019

A newsletter buzzing about board governance and management of condo and not-for-profit boards.

At our last coffee chat in December, Bonnie and Pat reminisced over 2019. Bonnie shared some of her home-made cookies. We realized that we had successfully produced 8 editions of our newsletter. Yes, we missed a few months, but not bad for a start.

The new year will bring some changes at the Elevator. Bonnie will be transitioning to a guest editor role to accommodate changes in her professional life. Pat will carry on but will have some help from the recent hire of a marketing and sales specialist at BoardSpace.

In this last edition of 2019, we have two blog posts, and four quick tips.

We wish you a very holiday and look forward to creating more great content in 2020.

Pat Crosscombe & Bonnie Oakes Charron, Co-Editors



**Happy Holidays!**

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## **The Director's Life Cycle Onboarding, Orientation, & Offboarding**

Nonprofit organizations need to onboard new directors every year. In this article we'll focus on ways to make sure new volunteers are onboarded quickly, allowing them to get up to speed and ready to serve. The transferring of information and processes can require a multitude of organization and effort, but if done correctly, can become the stepping-stone to new ideas and future successes within the board of directors.

[Read more](#)

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## **How to get the most out of your board meetings**

Does your board have great meetings?

No, not likely.

Too many meetings are poorly attended, take far too long, are unproductive, and without purpose or outcomes.

Having great meetings is not mandatory, but holding meetings that people want to attend is a smart approach.

Now is the time to make your meetings SMART. I'm flipping the script on board meetings and starting with the T first.

Yes, I know SMART is spelled S – M – A – R – T, but at BoardSpace, we think differently.

[Read more](#)

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## Creating an Annual Roadmap

### **Auto-generate your Agendas**

What is one of the best ways to ensure your agendas are always ready when you need them? Consider 'road mapping' an official calendar as a base, adding and subtracting topics where necessary during the year. Agree on the number of meetings per year, set the dates, and firm up the time allocated to each meeting.

Next, map out the business of your board:

1. What needs to be approved during the year?
2. What needs to be discussed during the year?
3. What needs to be provided, as information, to the board each year?

Plot these out on a chart, meeting by meeting. At the start of the year, populate your agenda templates with the information on your 'roadmap' – and start tackling your board work one meeting at a time. Undoubtedly the plan will be adjusted along the way, but it will always be a work in progress.

Bon Voyage!

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## **What you need to know when joining a not-for-profit Board**

Are you attracted to supporting and advancing the mission of a cause close to your heart? Thinking of joining a charity's board of directors? The positives will be aligning your volunteer work with your core values, assisting the charity to carry out its mission by contributing your time and talents, and connecting with other like-minded people by working with others in their volunteer and donor community.

Think too about any potential pitfalls. Do your due diligence to ensure the organization is meeting its financial and legal obligations, including having proper insurance for its board members. Beyond the compliance perspective, ensure the role is a fit with your ability to contribute.

Individual board members will likely be asked to assist with an organization's fundraising efforts. This could include engagement with potential donors, attending fundraising events (which may cost \$), and supporting the organization by either hosting a fundraising event or making a personal contribution.

Explore the job description with the recruitment committee before being appointed to the board. If it is unclear, ask questions. Both the charity and a prospective director want to be certain that the role and responsibilities are clear.

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## **What is a Dashboard? How to use one in a board setting**

Dashboards are a short infographic containing relevant statistics and facts that can be compared in a month over month or year over year fashion. They are a great tool for delivering a lot of information to the reader quickly and they offer a way to detect and monitor trends in organizational performance.

Boards are responsible for the long-term viability of the organization, and as such, dashboards can be used to keep them 'in the know' about key metrics. Use visual cues like colour-coding the content, or using graphics and charts to help the board identify areas for further discussion and action.

Check out this resource to learn more about dashboards for non profits.

[Read more about dashboards](#)

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## **Are you prepared for a leadership transition?**

Organizations can experience unplanned departures at any time. The sudden loss of a Board Chair, Executive Director, or key staff officer can be devastating if the organization is unprepared.

It is important to have a plan, and the plan should include both key documents and processes to get underway if a crisis occurs. The success or failure of the organization may be at stake.

Review [this list provided](#) by the NH Center for Nonprofits and see if you are prepared.

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**Yours in good governance,**

Pat & Bonnie

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