Best Practices and Techniques for Excellent Boards

Techniques to improve governance and management of associations, chambers and nonprofit organizations. Presented in 10 distinct modules to assist leadership and staff, by Bob Harris, CAE, of NonProfitCenter.com, instructor, author and certified association executive.

Board’s Roles & Responsibilities
- Making a Difference
- The Ten Responsibilities
- Three Legal Perspectives
- Being “Great, not just Good”
- Governance or Management?
- Governing Models
- Structure – Complexity
- Unique Terminology
- Run Like a Business
- Sarbanes Oxley and Boards

Protecting the Organization – Risk Mgmt.
- Apparent Authority
- Antitrust Avoidance
- Volunteer Immunity - Insurance
- Auditing, Audit Committee
- Public Records
- Sponsorships, Endorsements

Leadership Development and Orientation
- Process, Frequency
- The Leadership Manual
- Commitment and Ethics Form
- A Word about Confidentiality
- Board Assessment Tools
- Bylaws; Articles of Incorporation
- Policies and Procedures
- Special Terminology

Challenges, Issues, Values
- Diversity, Revenue, ROI, Workforce,
  Competition, Collaboration,
  Technology, Transparency, etc.
- Franchise Model of Efficiency

Finances - Budgeting
- Reading the Financial Report, UBIT
- The Audit Committee’s Role
- Maximizing Revenue Sources

Committees
- Charging Committees-When
- Standing Committee or Task Force?
- The Board Development Committee
- Committee Reports - Authority

Goals and the Strategic Plan
- Purpose of Planning
- Mission, Vision & Values Statements
- 90 Day Planning Process
- Appoint a “Plan Champion”
- Goals and the BHAG

Meetings of the Board
- Agenda Development & Notice
- Utilizing a Consent Agenda, Reports
- Minutes, Recordings and Notes
- Rules of Order
- Room Set-Ups

Membership, Retention, Benefits
- The Benefits Portfolio
- The Golden Handcuff
  “Treat them Like Customers --- Engage
  them Like Members”

Workforce and Staffing
- Relationships, Ethics
- Professional Development
- Communications, Technology
- Whistle Blower Clause

Bob Harris, CAE - Tallahassee, FL - 850/570-6000 - bob@rchcae.com - nonprofitcenter.com