Quick Fixes

Got a minute? Want to improve governance and management? Here are 15 quick fixes to key processes.

1. **D & O Policy** – Pull out the Directors and Officers liability insurance policy; make a copy and send it to an attorney for an opinion. Does the policy cover current activities and structure? An attorney may be willing to review the policy knowing that he or she may rely on the coverage in a legal case.

2. **Employee Manual** – Check your employee manual to see if it includes a “whistle blower clause.” In response to the policy questions on IRS Form 990, your board probably adopted a policy. Has it been transcribed into the employee manual so that staff is aware of its existence?

3. **IRS Form 990** – Filed annually, the form has undergone significant change. Some executives ask a CPA to complete it without much oversight. Pull out the recent filing and read it for insights. Does the 990 reflect reality? Did the CPA receive accurate information about policies and amendments? Did the board review the 990 prior to filing? An understanding of the 990 is good management.

4. **Policy Manual** – Policies are the wisdom of the board; reflected in the minutes and maintained in a policy manual. When was it last updated? Is it accurate or cumbersome to read? Is there a need for a review and sunset of old policies and recommendations for new?

5. **Membership Survey** – When were members last asked about their needs and satisfaction with the organization? Technology makes surveys cost effective. (Even if they don’t respond, they will remember that you cared enough to ask.)

6. **Brand Awareness** – Use a style guide to maintain a consistent message and brand. The short guide demonstrates proper use of your logo, color, formats and terminology to staff,
committees, chapters and consultants. It may include policies and protocols as to who speaks for the organization.

7. **Mission Update** – The mission, vision and values statements distinguish the organization. They should be contemporary and compelling. Compare the mission in use with the statement of purpose on IRS Form 990. If the mission needs an update, make suggestions to the board.

8. **Value Proposition** – “Our association is the best kept secret,” is a common board lament. Most members join for an *advantage*. Does the value of benefits and services exceed the dues paid? Have a task force review the package of benefits and services to determine if the diverse categories of membership realize a significant return on investment.

9. **Membership Application** – Does it clearly and concisely convey an image and key messages? Is the *required* IRS notice informing members of the non-deductibility of dues as a charitable contribution included (except for 501c3 organizations.)

10. **Professional Development** – Check the annual budget for the funding of staff training. If the board ignored or short changed staff education, come up with a 3-year plan of professional development. Allocate at least $500 for each staff member’s basic training and larger amounts for developing staff through certification and conferences. (If your board budgeted more for landscaping than for staff training, there may be a problem.)

11. **Strategic Plan** – Some plans simply collect dust. The plan should serve as a roadmap and framework for volunteer leaders. Are directors relying on the plan; do they have copies of the plan, interim reports and performance measures? Add vitality to your plan by reformatting it, aligning goals with committees, and celebrating achievements.

12. **Conflicts of Interest** – A question on IRS Form 990 asks how the organization regularly and consistently monitors conflicts of interest. Be sure your board commitment form and conflict of interest policy is understood. Format it for easy reading and consider how to integrate it into the nominations, orientation and installation processes.

13. **Dashboards** – Similar to a vehicle gauges that measure speed and fuel, you can measure organizational progress with a dashboard. Develop metrics (graphics if possible) on membership recruitment, retention and market share, budget income and expenses, savings reserve, conference attendance and website visits. Metrics focus the board on performance and outcomes, rather than historical reports.
14. **Antitrust** – Consider the Federal Trade Commission 2009 recommendation that all trade associations have antitrust avoidance measures in place. Review how you communicate antitrust avoidance to directors, committees and chapters. Is your statement in good form and do you have proof of delivery to the board in your minutes?

15. **Board Orientation** – The changing economy, media scrutiny and member expectations are cause for an annual orientation of the volunteer leaders. Review your orientation process and resources. Be sure you are communicating responsibilities in a clear, concise manner.

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Note: Bob Harris, CAE, provides free tips and templates at www.nonprofitcenter.com. Contact him at bob@rchcae.com.

Editor: If this fits your “New Years Resolutions for 2011” editorial calendar, that would be appropriate use of the column.