

*Pamlico Community College's Small  
Business Center*

*Presents:*

***Backbone Basics: Strengthening Your  
Nonprofit's Core Operations***

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**1. Work Smarter, Not Harder:  
Documents/Files**

**2. Refresh & Lead Your Team: Board &  
Staff**

**3. Stay Out of Court:  
Financial Oversight**

## Work Smarter, Not Harder: Document Systems



### Make Finding Information Quick & Easy

**Choose a shared electronic document storage system where everyone can access work documents**

*Examples: Microsoft 365, Google Workspace, Physical Server, DropBox, etc.*

**System needs to have the following abilities:**

- *All staff & board members can access files in office and remotely*
- *Set folder permissions for some folders to allow limited access to certain folders containing sensitive information*

## Create a File Folder System:

- Key Organizational Documents
- Grant Information
- HR
- Financial
- Programs
- Board

## Bring All Documents Together

- **Going forward, this is the ONLY place that work files should be saved**
- **Move all work files from previous locations into the shared document system including files from:**
  - Work Laptops & desktops
  - Staff's personal laptops
  - Staff & Board's personal One Drive, DropBox, Google Drive, etc.
- **This PROTECTS your organization's information & ENSURES continued operations during unexpected absences**

## *Where Are Your Documents?*

## **Getting the Right People on the Team: Board of Directors**

- Annually assess the skills, experience, & knowledge that will be needed among the board for us to achieve this year's goals
- Determine which of those are currently on the board
- Target new board member recruitment to fill any gaps that we have
- Provide clear board member & board officer job descriptions BEFORE the prospect chooses whether to join the board
- Be clear about board expectations and time commitments during recruitment

***What Do We Need From Every Board Member?***

***What Do We Need From At Least One Board Member?***

***What Does We Need From Several Board Members, but Not ALL of them?***

## **Getting & Keeping the Right People on the Team: Staff**

- Annually review job descriptions & update as needed
- Review the organizational goals for the year & determine if we have the skills, experience, and knowledge currently on staff to achieve those goals
- Fill the gaps: either recruiting new staff position or providing training to current staff positions
- Create annual professional development plans for each staff member
- Schedule times to show staff appreciation throughout the year (catered lunch, office games, surprise staff with office supplies in their favorite color)

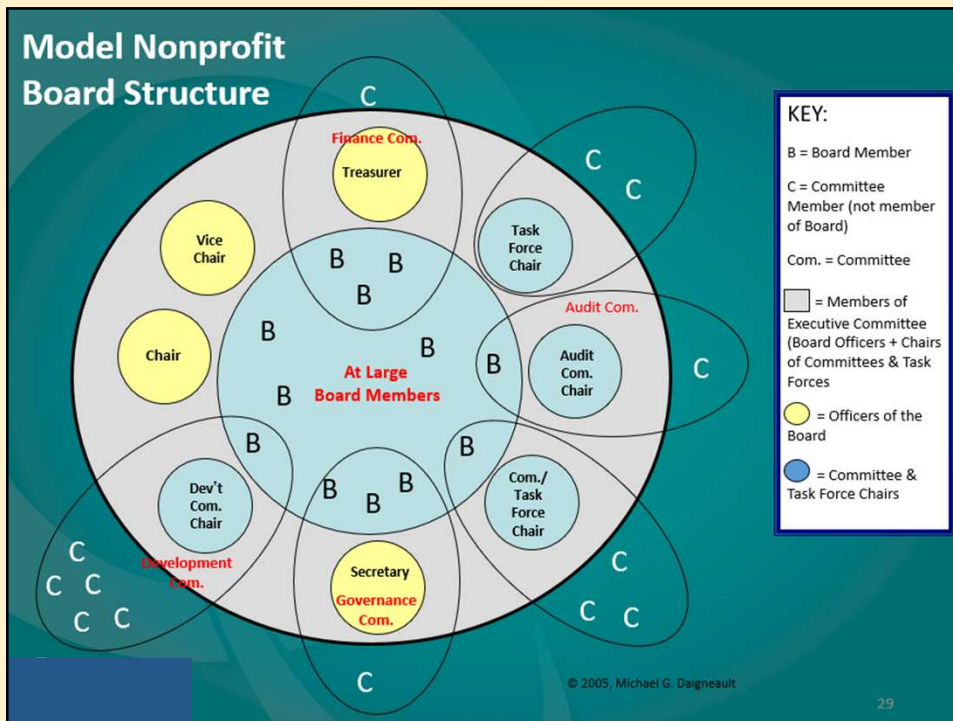
## **Making Sure the Players are in the Correct Positions: Board**

### **PEOPLE CAN SUPPORT YOUR NONPROFIT WITHOUT BEING A BOARD MEMBER**

- Annually assess board member attendance & engagement for the prior year
- For those not meeting the expectations of a board member, find new “positions” for them to play:
  - Committee member
  - Advisory board
  - Volunteer

## Setting Your Team Up for Success: Board Committees

- Prevent board member burnout
- Expand expertise
- Increase efficiency and effectiveness
- Expand our networks



## Clearly Define Expectations: Board

- Review board member & officer job descriptions
- Create a board member “Win-Win Agreement”
- Set goals that can be measured and quantified
  - Each board member will attend no fewer than 75% of board meetings
  - Board members will actively participate in at least one board committee

***What Does Success Look Like?***

## Creating the Win-Win Agreement

What can the board member expect from the organization?

What does the organization expect from each board member?

***It's all about the GIVE and Take***

## Setting Your Team Up for Success: Staff

- Review this year's organizational goals
- Discuss how each position contributes to those goals
- Create clearly defined performance goals for each position that are measurable
- Discuss what success looks like:
  - As a staff team
  - In each individual's work
- Schedule all staff meetings and staff quarterly performance discussions for the year

**What Does Success Look Like??**

## **Make It Silly Simple To Do The Work**

- What would make it easy to do your job? (Bullet points, cheat sheets, talking points)
- What would make it easy to attend fundraising/social events? (reminders, calendar months in advance, competition awarding board member that attended the most events)
- What is something else that would make your job easier?

## **Stay Out of Court: Board Oversight**

- Active Finance Committee & Treasurer
- Review monthly:
  - Budget to Actual Report
  - Statement of Financial Position
  - Statement of Financial Activities
  - Accounts Receivable Aging Report
  - Accounts Payable Aging Report
  - Credit card statements
  - Payroll register
  - CEO/Executive Director Expense Reimbursements
  - Proof of payroll tax filings & payments

## **Stay Out of Court: Board Oversight**

- Stop using signature stamps & sharing login information
- Create policy for check signatories
- Review and remove former check signatories
- Review and remove access to online bank or payment accounts for anyone not currently authorized
- Annually review IRS Form 990 & see proof of submission
- Annually renew NC Charitable Solicitation License with NC Secretary of State

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To schedule a consult:  
[www.calendly.com/wpsstrategygroup](http://www.calendly.com/wpsstrategygroup)