A Yearly Workplan for a Nonprofit Board

Sample

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| Major Board Initiatives | Who’s Responsible | Activities | Time Frame | Deliverable(s) | Mid-Year Check |
| Create new 3- year  Strategic Plan | * Ad Hoc Task Force * Full Board Input * Full Board approval | * Appoint Task Force * Review progress of past plan * Assess relevancy of past goals * Hire consultant * Schedule of input meetings * Identify Opportunities * Set goals and strategies * Identify realistic deliverables | January 2025 to October 2025 | Approved dynamic and relevant 3-year working Strategic Plan that staff and board are enthused about and ready to tackle. | Chair and Board review progress of work plan at 6-month mark and make changes as needed. |
| Reach fundraising goals | * Partnership between Fund Development Committee and Senior Staff * Full Board approval and engagement | * Board attends/supports events * 5 individual board members host 5 small mission events * CEO/chair meet with 25 donors * Secure past donors’ gifts * Expand donor base by 25% | Calendar Year | Funding goals met or exceeded |  |
| CEO Annual Evaluation | * Governance Committee * Board surveyed | * Assess tools * Gain CEO input/Survey Board * Tabulate results/meet with CEO * Set salary for coming year | By May 5, 2025 | CEO provided with quality experience and performance plan for 2017 |  |
| Policy Platform | Advocacy Committee  with Staff/Board Approval | * Assess policy issues * Input from board, staff & experts * Design and approve platform | By January 30, 2025 | Policy Platform in Place |  |
| Recruit and engage 3 new board members | * Governance Committee Input * Full Board approval | * Fill out board matrix * Board and CEO input * Board follows recruitment and nomination policy and procedures | By November 2025 | Board recruitment goals met |  |

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| Standard Board Business | Who’s Responsible | Activities | Time Frame | Deliverable(s) | Mid-Year Check |
| Financials are up to date reviewed and approved by Board | * Finance Committee * With CEO and staff * Board review approval | * Monthly Com. mtgs. * Review/Assess fiscal issues * Report development | Bi-monthly | Clear, updated balanced Financials |  |
| Audit Completed | * Audit Committee * Full board review/ approval | * 3 committee mtgs. * meet with Auditors * Board input/approval | April-June | Audit concluded |  |
| Committee Chairs & Members are assigned and have goals for year meetings scheduled | * Board Chair * Committee Chairs | * Chair assigned; goals set * plan for committee set * committee assumes role * keeps board abreast of progress and issues | January | Committees engaged and meeting goals |  |
| Board Officers are in place | * Full Board | * Potential new leaders are identified, recruited, and mentored * Board engages in nomination process | June  December | Board Officers in Place |  |
| Board Members kept abreast of organization news | * CEO * Board Chair | * Board newsletter * CEO reports * Board Updates | Ongoing | Board informed of org. issues and accomplishments. |  |
| Board Meetings scheduled, agenda set, packets delivered | * Board Chair in partnership with CEO | * Annual Board agenda prepared and distributed early * Chair prepares with CEO * Agenda with substance * Board prepared for meeting | November  Bi-Monthly | Effective Board Meetings |  |
| Governance Committee maps out yearly Board training & implements | * Governance Committee | * Board meetings include 15 minute of board training * Board retreat occurs | January - ongoing | Engaged, educated Board that understands its role |  |
| Board is prepared and participates in donor cultivation, stewardship & events | * Fund Develop. Com. * CEO /fund dev. staff | * Board fundraising training, * Plans for each strategy presented to board. | Throughout the year | Board effective in Fundraising |  |