The Accelerated Board Leader Kickoff Kit

A digital resource provided by your friends at

boardable

Welcome to the world of board leadership.

The nonprofit world relies on the dedication and ingenuity of its board members to meet its goals. As a board leader, it's your job to ensure your organization does more than just meet goals. You need to spark and maintain excitement, drive engagement, and boost productivity.

Sounds like a tall order, right? The good news is you don't have to go it alone. The growing tech landscape is full of tools built to empower nonprofit boards to maximize existing resources and find new ones.

The Accelerated Board Leader Kickoff Kit offers a useful list of resources that will help you get the most out of your board membership experience. Leveraging the right apps and programs can streamline processes, increase visibility, and make serving on a board (slightly!) easier.

We're breaking tools down into three broad categories:

1. **People management:** It's the biggest, most significant element of your job. Learn how to manage your fellow board members online, deliver timely communications to team members and volunteers, and streamline meeting and event planning.

2. **Communications and marketing:** Get your message out clearly and consistently. Your internal audience will demand quick follow-up, while external audiences demand details and easy access to information. Discover tools that can accommodate both needs.

3. **Fundraising and accounting:** Fuel your mission with a well-run funding system. Build and maintain your donor pipeline, run useful reports, and make financials the least stressful part of your responsibilities.

Each of these categories encompasses the core elements of a well-run and effective board. The tools offered under each will empower you to become an engaged board leader, faster.

Keep reading and learn how to kick your board leadership tenure into high gear.

01
People Management

What's a nonprofit without the people? From staff and volunteers to board and committee members, people are the lifeblood of your organization. That makes people management your top priority as a successful board leader.

With people management comes the events and meetings you'll need to attend and coordinate. Search for solutions that remove friction from meeting planning, ease communication between board members, and encourage volunteers to contribute their time and voices to your nonprofit's cause.

VOLUNTEER AND EVENT MANAGEMENT

The team in the field is just as important as the team in the boardroom. Nonprofits rely on volunteers to drive change and carry out the mission of the organization. But the same challenges nonprofits face in attracting and maintaining board members are present in volunteer management: attracting people, keeping them engaged, and encouraging them to commit to volunteering on a regular basis.

Whether you'll handle this yourself or will delegate volunteer management to a team member, the right tech can save precious time.

SignUp.com offers online sign-up sheet templates for a long list of nonprofit events, sends invitations via social media, and syncs calendars.

Samaritan is a volunteer management system designed to help boards find, register, verify, and track volunteers in one interface. Record hours, set up sign-in stations, give surveys, and sort through data to make scheduling fast. If background checks are necessary, Samaritan lets users complete them in real time.

BOARD AND COMMITTEE MANAGEMENT

Taming a board's demanding schedules can seem impossible—but with the right communication tools, staying in touch and planning meetings can go smoothly. For organizations that have a limited budget, free or low-cost communications platforms like **Slack** and **G Suite** are useful tools with gentle learning curves. They allow instant updates, file sharing, and meeting planning in central locations. But these platforms are not designed for the unique needs of a board, and their limitations can be frustrating to board members and staff.

Nonprofit boards with more advanced communication needs must be able to choose the right solution for their unique requirements. Solutions available include:

Boardable takes the guesswork out of board management with a document center, real-time vote and poll features, and a meeting center. Make scheduling and agendas easy and painless, help board members manage their own time, and amplify the reach of the board. Boardable is ideal for community nonprofit organizations.

BoardEffect's portal software enables you to engage a board of directors through online board books, scheduling, and more on desktop and mobile. BoardEffect is ideal for corporate boards as well as larger nonprofits.

Diligent offers a tool for board directors and trustees on the go. The cloud-based, mobile-first interface provides easy access to materials, even offline. Diligent is ideal for large corporate boards.

02
Communications & Marketing

As a board leader, you must sell your message internally as well as externally. But even the best messages can't make an impact if no one hears them. That means communications and marketing have to be both clear and compelling. Lucky for us, social media has become the most effective channel for sharing messages, calling people to action, and interacting with target audiences.

INTERNAL PROMOTION AND ENGAGEMENT

Promotion and engagement are much easier thanks to social media. It's provided nonprofits of all sizes a mostly cost-free way to find, attract, and interact with both potential board members and volunteers. Knowing how to leverage social media is one of most valuable skills a board leader can develop.

> Use **Facebook Groups** to connect directly with supporters, offer exclusive content, hold polls, and collaborate on event planning. For internal audiences, Facebook Groups can supplement the communications that board and committee members have via email or offline channels.

EXTERNAL PROMOTION AND MARKETING

Of course, there's more to social media than posting statuses and photos. Social media is also one of the most effective marketing tools available—provided it's used correctly. Tracking social media post performance, investing in paid social ads, and creating social content for target audiences are all necessary for a successful promotion and marketing plan.

A social media dashboard can make external promotion and marketing much easier for busy board leaders and their teams. The dozens of free and low-cost tools on the market give you the power to schedule posts and receive engagement analytics. You can also use them to find and follow influencers in your space. If your organization has funding for paid social ads, a social media dashboard can track ad performance as well as ROI.

Creating the content to engage audiences is only half the battle; the other half is paying attention to which messages work best. Many social media channels have their own native analytics tools—but with a social media dashboard, you can compare channel performance in one place.

Hootsuite and **Buffer** have both free and premium options for reporting and engagement tools, as well as scheduling features. Manage nearly all your social media channels at once, get real-time insights into performance, and set times for posts to go live, so you don't have to sit in front of a laptop.

TweetDeck is 100% free and offers a clean, easy-to-use interface for multiple Twitter accounts. This can be especially useful for real-time engagement during live events.
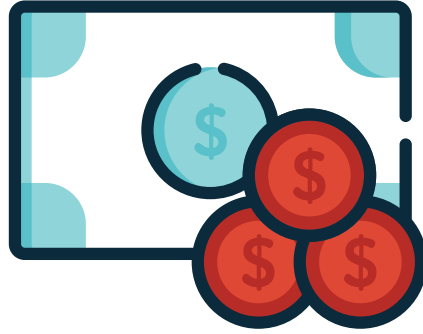
03
Fundraising & Accounting

Regardless of the organization, fundraising is foundational to fulfilling your team's financial goals. The fintech landscape is growing rapidly, and many companies are creating nonprofit versions of their commercial software. Invest in solutions that enable easy giving, track the donor pipeline, and simplify the accounting process.

FUNDRAISING AND GIVING

Forget telethon phone lines and little envelopes: it's never been easier to donate. Mobile apps, social media integrations, and SMS texting provide donors with quick ways to give money in just seconds. Social media is becoming the Swiss Army Knife of online communication, and one of the world's most popular social media channels offers a wide range of fundraising options.

> **Facebook** makes it easy to set up fundraising programs. The social media platform also partners with **Network for Good** to distribute funds to nonprofits not registered with Facebook Payments, allowing smaller nonprofits to save the step of signing up.

For more advanced needs, consider a donor database platform that can handle relationship management, donor retention, reporting, and content distribution.

Bloomerang delivers donor management and retention, reporting, and email distribution in a single platform. Reduce donor attrition, increase revenue, and integrate with dozens of other systems for seamless content creation and message consistency.

Salesforce also offers a nonprofit version of its CRM to help with donor relationship management. Salesforce.org includes Philanthropy Cloud, which partners with **GuideStar**, the world's largest database for nonprofit organizations.

Mobile giving is also growing in popularity, and dedicated apps can offer visibility and ease of use. Organizations like the Red Cross have used SMS text donation for years, but there are now digital platforms that allow you to track donations, engage donors, and integrate them into your overall strategy.

OneCause offers Text2Give, a program fully integrated into the larger OneCause platform. Create custom calls-to-action, receive direct deposits, and track donations in real time.

Givelify is a free mobile app that collects donations and offers a web portal for nonprofits to track and receive funds. Customize the app to include your organization's branding, create campaigns, and integrate with existing financial management software.

ACCOUNTING

Every dollar a nonprofit receives must be used wisely. As a board leader, you may be tasked with handling at least some of the financials—and having the right software can make the difference between clean books and another headache.

It's likely that your organization already uses accounting software to balance its books. But unless an accounting solution is easy to use, integrates with other programs, and is updated regularly, nonprofits can end up wasting valuable time and money on inefficient processes.

QuickBooks Nonprofit Software is a familiar program with features for the nonprofit sector. Create advanced donor lists, customize security for donor data, and run reports quickly. QuickBooks also allows for multiple users to work at the same time, removing the need to wait for file access.

Aplos is simple, online accounting software where no experience is necessary to keep your books. Built specifically to serve nonprofits and places of worship, Aplos is cloud-based and requires no downloads. Affordably priced and easy to use, it's a great solution for many small and medium-sized nonprofit organizations to accept and track donations.

Ready for kickoff?

Increasing board productivity isn't just about shorter meetings and higher donation figures. It's about leaning in to the challenges of leading a nonprofit board, understanding its vision, and committing to making your little patch of Earth a better place to live. Chances are you're early in your board leadership journey, but the following three takeaways are valuable whether you're a newcomer or a veteran.

Listen. Listen to your fellow board members, your volunteers, and the people who staff your organization. You will learn much more by inviting people to tell you what they need to succeed, how they view their own roles, and why they're involved with your organization.

Mind the clock. Time is money, even in the nonprofit world. That means a big part of your job will be finding ways to get more done in less time. Respect the schedules of your fellow board members by prioritizing online methods of communication and flexible meeting times.

Reach out. The work of a nonprofit board is never done, regardless of how successful you are. Use your networks to raise awareness and funds for your cause, and make outreach an integral element of your leadership. The more people who can help you reach your goals, the better off your organization will be.

Today's nonprofit ecosystem relies on technology to thrive. Your commitment to finding the right resources and tools to become a better leader will propel you on a fulfilling journey to serve others.

Who is Boardable?

Built by Nonprofit leaders, for Nonprofits. Boardable empowers you to work more effectively with your boards and committees. We know the frustration you feel (and the hours you lose) just from organizing a meeting via email, phone, and text. We've lived it. We're from the nonprofit world, too. After looking around for the right tool but not finding it, we decided to build it. Boardable is a software platform that centralizes all communication between you and your board. Find the best meeting times, securely store all of your documents, archive discussion threads and more—all in one place.

For more information, to schedule a demo, or to sign up for your FREE 30-day trial, visit us at boardable.com