

Board Meetings: 9-Step Timeline for Staying on Track and Engaged

Much of a nonprofit's key fundraising work actually happens during board meetings, so they need to be as efficient as possible. Here's an easy-to-follow timeline to help you plan and execute effective board meetings that keep your board engaged and on track. This timeline is based on monthly meetings, but it can be easily adapted for quarterly meetings.

24 Hours After the Board Meeting: Distribute Meeting Minutes

Even the most accurate minutes lose their impact weeks after the meeting. Highlight strategic action plans and who will serve as lead for each item.

26 Days Before the Next Board Meeting: Prepare the Agenda

Use a template that includes your standard board meeting procedures. Follow the STARS method:

- **Specific:** Define each agenda item in terms of its intended outcome.
- **Timed:** Each agenda item should have a realistic assigned period of time
- **Actionable:** Each item should initiate a definite action as a result of the meeting discussion.
- **Relevant:** Each agenda item should be relevant to the whole board, not just one or two members, and the organization's mission.
- **Shared:** Provide board members with a copy of the agenda in advance so they can be prepared.

24 Days Out: Review Action Items and Follow Up

Reach out to the person assigned to each action item with a friendly reminder, offering direction and support. If you receive no response, send another reminder of the action steps with the notice of the next upcoming meeting, requesting a status update. Being specific on your follow-up increases the likelihood of its successful, timely completion.

18 Days Out: Update Key Staff on Board Decisions, Discussions, and Future Plans

Engaging staff with appropriate, relevant board discussions can result in unique insights that only those on the front lines of day-to-day operations can provide.

11 to 13 Days Out: Meet with the Board President

Do this prior to finalizing the agenda. This gives you time to discuss priorities, provide status updates on action plans, and exchange ideas and observations without the limitations of a formal full-board meeting.

10 Days Out: Prepare Meeting Packets

Include previous board meeting minutes, an agenda for the upcoming meeting, financial documents, committee reports, and any relevant data on the organization's performance, key functions, and current opportunities.

7 Days Out: Distribute Agenda, Reports, and Meeting Reminder

Include any reports, financial statements, or research to be discussed during the next meeting.

During the Board Meeting: Stick to the Agenda

Prioritizing agenda items and staying within allotted timeframes keeps board meetings focused and productive. When things start to move off topic, find creative ways to steer the discussion back to the agenda.

Keep everyone engaged by making sure every person has an opportunity to contribute. Talking and listening should be equally encouraged, while relating comments and recommendations into the context of the meeting.

Also, be sure to recognize the individual and collective contributions of the board at each meeting. Exceptional contributions and achievements should be recognized appropriately with thank you notes, small gifts, or commendations.

Also: Take Thorough Meeting Minutes

Obviously, the more accurate and detailed your meeting minutes, the more effective the outcomes. In addition to recording meeting details, incorporate a consistent method of identifying action items and the person delegated to complete them. Using a highlighter or colored/bold font for particular action items is a simple but effective method to ensure they are easily referenced later.