



*The Essential Nonprofit
Board Toolkit*

EVERGREEN COMMUNICATIONS



Whether launching a new nonprofit or strengthening an existing one, this toolkit offers practical, customizable resources to help you recruit, manage, and engage your board effectively.

INCLUDED IN THIS TOOLKIT

- Board Effectiveness Checklist
 - A checklist to help nonprofit leaders evaluate overall board health and effectiveness
- Board Member Roles & Responsibilities Overview
 - A quick-reference guide outlining the typical duties of each key board position
- Board Skills & Diversity Matrix
 - A fillable worksheet to help you visualize current board strengths and identify gaps in experience, expertise, or representation
- Sample Board Member Job Description
 - A clear, customizable description to use in recruitment, onboarding, or updating expectations
- Board Commitment Agreement
 - An editable document that outlines what's expected of board members in terms of time, fundraising, participation, and advocacy
- Sample Board Meeting Agenda
 - Keep meetings efficient and mission-focused with this simple agenda template
- Board Self-Evaluation Checklist
 - Use this annual self-assessment to help board members reflect on their performance and identify areas for growth



Board Member Roles & Responsibilities Overview



BOARD CHAIR / PRESIDENT

Leads board meetings | Sets agendas | Partners with ED on strategy | Public-facing representative



TREASURER

Oversees finances/ budgets | Reviews financial reports | Ensures audits/filings are completed



SECRETARY

Records meeting minutes | Maintains board records | Supports board communication



BOARD MEMBERS (GENERAL)

Attend and contribute to meetings | Serve on committees | Help fundraise and network



Board Skills & Diversity Matrix

Board Member	Name	Name	Name
Finance	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Legal	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Fundraising	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Program Expertise	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Community Connection	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Marketing	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Diversity Knowledge	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Strategy	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>



Sample Board Member Job Description

ROLE SUMMARY

As a board member, you play a critical role in ensuring the organization's health, sustainability, and impact. Your responsibilities include providing strategic direction, offering fiduciary oversight, and acting as an ambassador to the broader community. Board members work in partnership with staff leadership to uphold the mission and values of the organization.

EXPECTATIONS

- Attend and participate in all scheduled board meetings
- Review materials in advance and come prepared for discussion
- Serve on at least one committee or task force
- Actively contribute to fundraising efforts by making a personal gift and supporting donor cultivation, grant outreach, or event planning
- Attend fundraisers, program showcases, or community events
- Act as an advocate for the organization, promoting its mission to networks and stakeholders
- Support the Executive Director/leadership team as needed with insight, connections, and resources

TERM LENGTH

Board members serve a term of [e.g., two years], with the opportunity for renewal for [one or two additional terms]

IDEAL QUALIFICATIONS

- A passion for the mission and a commitment to equity, inclusion, and service
- Willingness to contribute time, energy, and expertise to help the organization
- Experience or knowledge in one or more of the following areas:
 - Finance or accounting
 - Legal or compliance
 - Fundraising and donor engagement
 - Community outreach or lived experience in the community served
 - Marketing, communications, or media



Board Commitment Agreement

As a member of the Board of Directors of [Organization Name], I understand that I play a vital role in supporting the organization's mission, providing governance, and helping to ensure long-term sustainability.

By signing this agreement, I commit to fulfilling the responsibilities of my role to the best of my ability. I understand that my active participation strengthens the organization and the communities we serve.

As a board member, I commit to:

- Regularly attending and actively participating in board meetings
- Staying informed about the organization's work
- Serving on at least one committee or task force, if asked
- Participating in fundraising by making a personal contribution and supporting donor engagement
- Attending and promoting key events
- Acting as an ambassador for the organization in the community
- Maintaining confidentiality about board discussions and sensitive information
- Disclosing potential conflicts of interest and abstaining from votes where conflicts exist
- Acting in the best interest of the organization and its mission
- Supporting the organization's goals with positivity, professionalism, and integrity

I acknowledge that this is a working board, and my time, talent, and resources will help the organization grow and thrive. I understand that failure to maintain these commitments may result in a conversation with board leadership about my continued service.

Name: _____ Signature: _____
Date: _____

This document is intended as a sample resource for general guidance only and does not constitute legal advice. Nonprofits should consult with legal counsel or a qualified governance expert to ensure this agreement aligns with their bylaws, policies, and applicable state laws.



Sample Board Meeting Agenda

- Call to Order
- Approval of Minutes
- ED Update
- Committee Reports
- Strategic Discussion
- Action Items
- Adjourn



Board Self-Evaluation Checklist

Please rate yourself on each of the following statements using the scale below:

1 – Strongly Disagree | 2 – Disagree | 3 – Neutral | 4 – Agree | 5 – Strongly Agree

There's also space for comments if you'd like to elaborate on the next page.

I attend board meetings regularly.	1	2	3	4	5
I come prepared to meetings and review materials in advance.	1	2	3	4	5
I actively participate in board discussions and decision-making.	1	2	3	4	5
I serve on at least one committee or support board initiatives.	1	2	3	4	5
I help promote the organization's mission in my personal/professional circles.	1	2	3	4	5
I have a clear understanding of the organization's mission and goals.	1	2	3	4	5
I make a personal financial contribution each year.	1	2	3	4	5
I actively support fundraising efforts (donor outreach, events, etc.).	1	2	3	4	5
I maintain confidentiality and uphold board ethics.	1	2	3	4	5



Board Self-Evaluation Notes

Feel free to elaborate on any of your answers from the previous page.

FINAL REFLECTION

What is one thing I did well this year as a board member?

What is one thing I'd like to improve or contribute more toward next year?



Best Practices for a High-Performing Board

INVEST IN THOUGHTFUL ONBOARDING

Give new board members a warm welcome and the tools to succeed. Provide them with:

- A board handbook or welcome packet
- A meeting with the Executive Director
- A buddy system or a mentor on the board

PRIORITIZE DIVERSITY, EQUITY, AND INCLUSION (DEI)

Diverse boards bring richer perspectives and stronger connections to the communities you serve. To move the needle:

- Use a skills + lived experience matrix to identify gaps
- Expand your recruitment networks beyond the usual circles
- Offer ongoing DEI training to board members

SET CLEAR TERM LIMITS AND SUCCESSION PLANS

Avoid burnout and keep leadership fresh with:

- Term limits (e.g., two 3-year terms)
- Staggered transitions to retain institutional knowledge
- A clear process for identifying and mentoring future leaders

ENCOURAGE ONGOING LEARNING

Strong boards never stop growing. Consider:

- Annual retreats or workshops
- Guest speakers on nonprofit trends or fundraising
- Sharing articles, webinars, or newsletters in between meetings
- Make Time for Self-Assessment and Reflection

Use tools like the self-evaluation checklist in this guide to spark discussion and continuous improvement.



Use this tool to assess where your board is strong and where you might need to grow.

- We have a clear and up-to-date board member job description
- Our board reflects the diversity of the community we serve
- We use a skills matrix to identify gaps and guide recruitment
- We actively recruit outside of our personal networks
- We provide a strong onboarding process for new members
- Members come prepared and actively participate in discussions
- Board members support fundraising efforts in meaningful ways
- We celebrate and acknowledge board contributions



Use this tool to assess where your board is strong and where you might need to grow.

- The board understands and upholds its fiduciary duties
- We review financials at every board meeting
- The board regularly reviews and updates bylaws and policies
- Strategic planning is a recurring focus of board meetings
- We conduct annual board self-assessments or peer reviews
- We have a board succession plan in place
- Term limits are established and followed
- Ongoing training or retreats are offered for board growth



Use this tool to assess where your board is strong and where you might need to grow.

- Board members can clearly articulate the mission and impact
- They serve as ambassadors in the community
- They are regularly updated on key organizational happenings
- There is a culture of transparency and open communication
- The board helps raise the nonprofit's public profile

If you checked fewer than 15 boxes, consider focusing on board development over the next 6-12 months.



Thank You!

I hope this toolkit helped you feel more confident in building or strengthening your nonprofit's board. I'd love to hear how you're using it! Feel free to reach out and share what's working, or let's chat about how Evergreen Communications can support your next step in public relations or communication strategy.

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