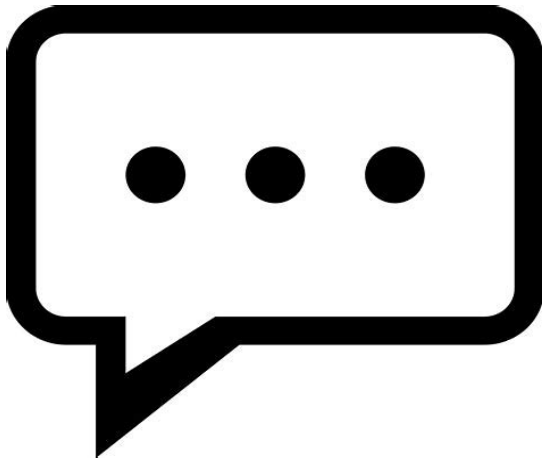


New Board, New Year Planning Tips

June 2021

Hospitality



Use Chat to ask questions



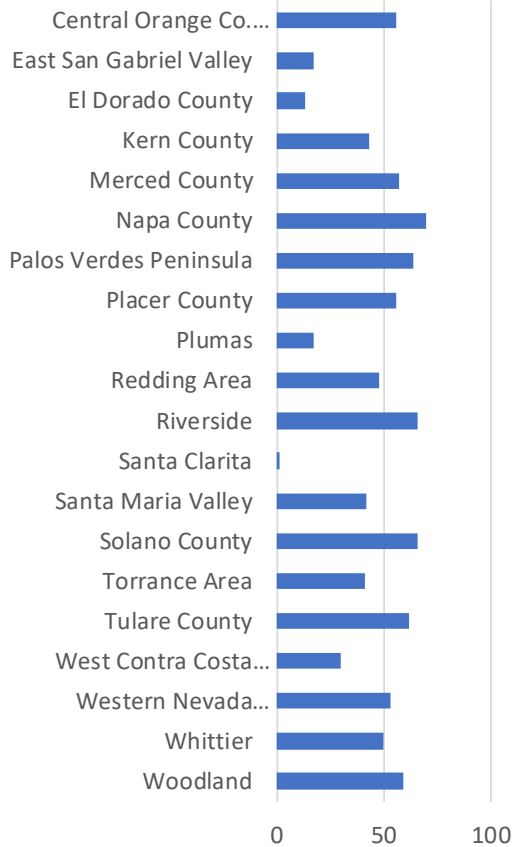
Please stay muted.

Local League Coaches

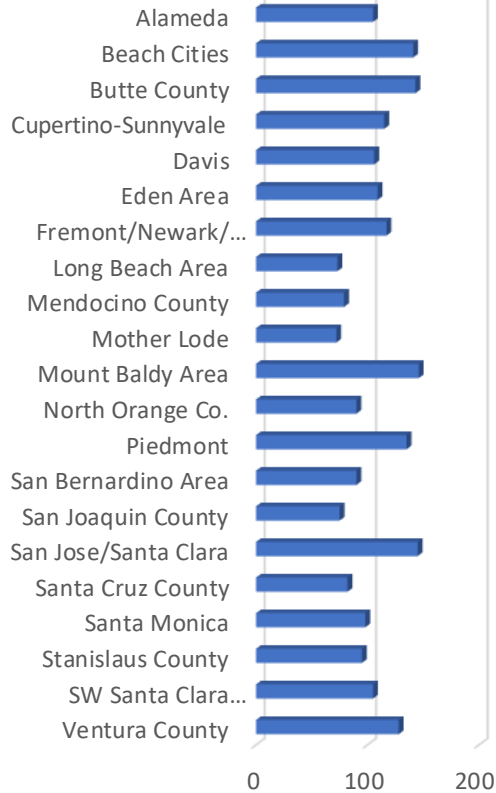
- Support program has existed and evolved since at least 1970's
- Each League is assigned a Local League Coach
- Local League coaches have vast League experience and can help local League find resources
- Local League Coaches
 - Responding to calls for assistance
 - Keeping abreast of the local League activities, bylaws, policies and nonpartisan policy
 - Keeping in touch with the local League leadership and inform them of State activities
 - Arranging for training, including offering annual board orientation
- Mighty team of 20 League volunteers here for you!

California Leagues

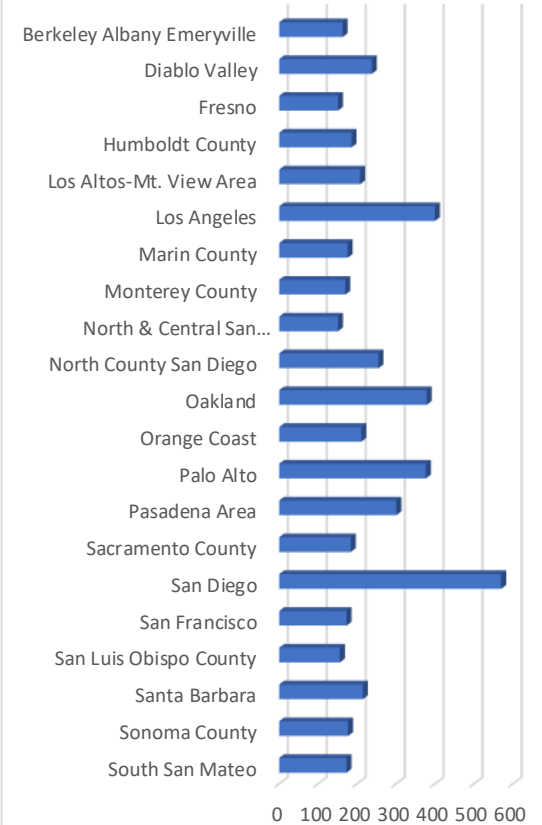
Leagues Smallest Tier (1-70)



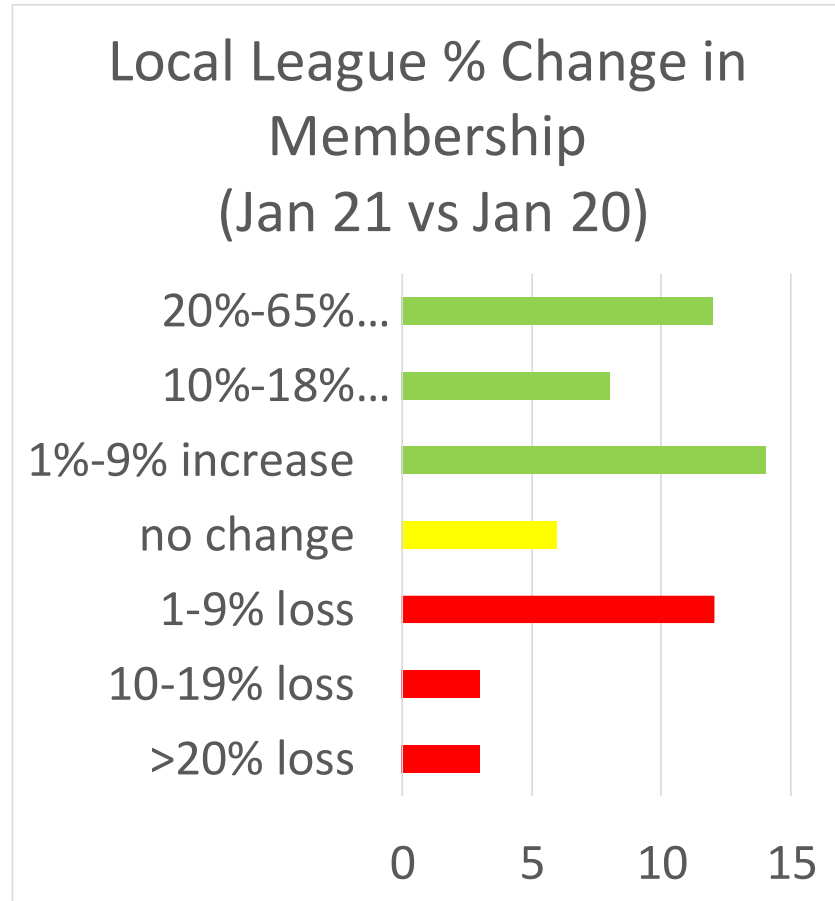
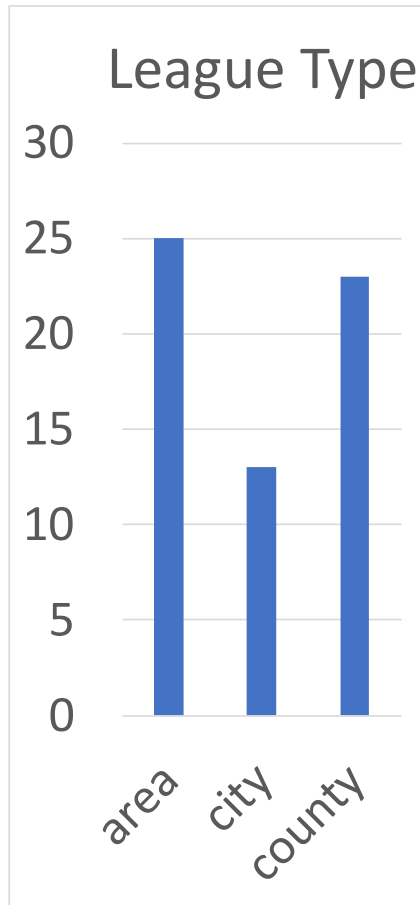
Leagues Middle Tier (72-146)



Leagues Largest Tier (151-570)



California Leagues



Poll Questions

- How long you have been a League member?
- How long you have been on your local Board (current continuous years)?

Team Readiness

- Board Knowledge of
 - League
 - Responsibilities/Expectations
 - How well do you know your fellow Board Members?
- Local League Preparedness
 - Local Priorities Determined
 - Committee Structure
 - Financial Health
 - Fundraising
 - Membership Growing/Stable/Declining

Board Logistics

- Board Members Ability/Time to Meet
- In Person/Remote Meetings

National/State Priorities

- Making Democracy Work
 - Redistricting
 - Voting Rights/Expanding the Electorate
 - Money in Politics
- Climate Change/Sustainability/Water
- Housing and Homelessness
- Criminal Justice Reform
- Diversity, Equity and Inclusion (DEI) focus in all practices/actions

Local Priorities

- Weave in Your League's Priorities from your Program Planning Meeting
 - Action
 - Education
 - Voter Services Outreach Activities
 - Etc.

Activities to Support Priorities

- Determine activities to support priorities
- For each activity – Answer the following:
 - Who's responsible?
 - Can this be delegated to a committee?
 - What is the cost? Is it in the budget?
 - Where does it fit on the calendar?
 - Can we work with other community partners?

21/22 Board Calendar Meeting

- Board Meetings
- Committee Meetings
- Fundraising Events
- Community Events (monthly, quarterly, etc.)
 - Community Education
 - Advocacy
- Voter Service Type
 - Voter Registration
- Recall Election - Fall
- State/Local Programming Planning – Jan/Feb
- National Convention – June
- Annual Meeting

** Resource - 21/22 League Calendar

POLL

- What documents have you read from your local League?
- Nonpartisan policy
- Bylaws
- Budget for 21/22
- *League Basics* from LWVUS
- DEI Policy referenced in Bylaws

Review local policies and procedures

- Nonpartisan Policy**
- Diversity, Equity and Inclusion Policy
- Other Local Policies

- Annually review policies make sure Nonpartisan and DEI is understood.

** Resource – LWVC Skits

Get to Know Your Board Members

- Plan an activity or two:
 - Icebreakers - 30 minutes
 - Compass activity
 - Determine work/communication styles - 1 hour
 - League Skits– 22 League type topics
 - League True/False Quiz

** All the above included on Resources

Committees

- Strong committee structures help support Board
- Committees to have depending upon local priorities/need
 - Action/Advocacy
 - Financial Related –Audit, Budget, Finance, Fund Development
 - Communications
 - Issues Type – (Climate Change, Criminal Justice, Housing/Homeless, etc.)
 - Nominating
 - Membership
 - Observer Corp
 - Program
 - Voter Service

Financial Health

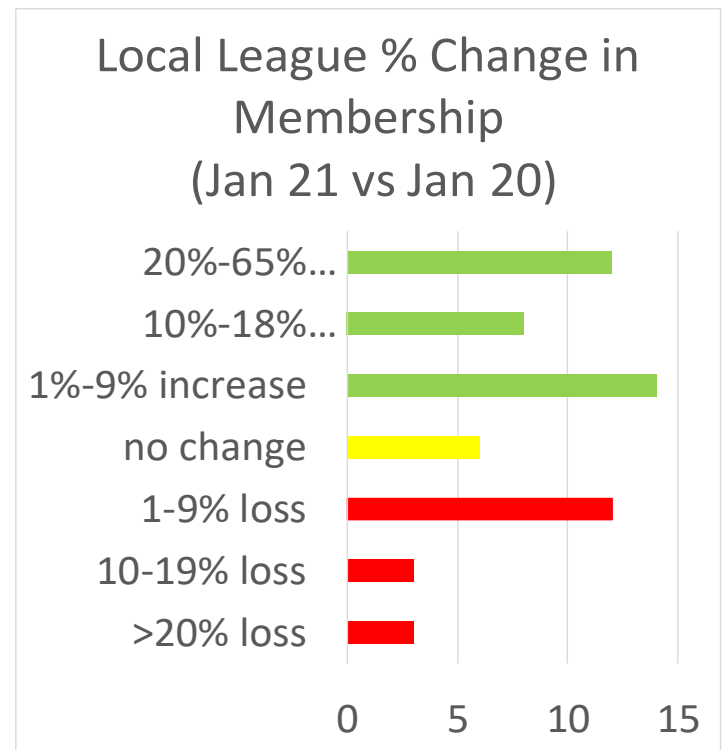
- Board members are trustees of the organization's assets
- Understand Financial Statement Basics
 - Budget
 - Statement of Activities (Profit/Loss)
 - Statement Financial Position (Balance Sheet)
- Oversee Organizations Legal Obligations
 - All tax filings with government agencies have been completed on time

Fundraising

- What is your fundraising strategy?
- How much money is needed this year?
- How should it be done?
- Who is going to do it?
- When will it be done?
- Work to incorporate fundraising into your local program priorities

POLL

- Is your League membership
- Growing
- Stable
- Losing
- I do not know



Membership

- Recruitment techniques
- Retention techniques
- Training and engaging new Members
- Make sure to add all activities to the Calendar
 - Incorporate your local priorities “work” with an eye to attracting and retaining members
 - Fold in fundraising strategies and events with an aim to sustaining organizational viability

League 101 Board PowerPoint

- Board Training Session – (includes 35 slides)
 - Nonpartisanship
 - Board Responsibilities
 - Relationship Among Levels of League
 - League Program
 - Voter Service
 - Advocacy and Speaking with One Voice
 - Resources
 - History of the League

Local League Assessment Tool

- How is your backbone? (Administration)
- How is your heart? (Atmosphere)
- How is your mind? (Program)
- How are your muscles? (Action)
- How good is your balance? (Voter Service)
- How is your recruitment and retention of Members (Membership)?

Traditional League Board Retreat

- All day event
- May use an outside facilitator
- Get to know Board members – Icebreakers
- Review local Policies and Procedures
- Explore ways Boards can use this time:
 - Work together more efficiently
 - Determine how to implement Priorities
 - Distribute the workload evenly and delegate appropriate tasks to off-board members
 - Develop Calendar for the year

**See Board Source Board Retreat planning handout

Summary

At minimum it is important that your Board:

- Plan for activities to support Priorities/Goals by assigning and calendaring all known events
- Review Policies and Procedures
- Remember to have FUN while doing this important League WORK!

Team Readiness Index

- Board Knowledge of
 - League
 - Responsibilities/Expectations
 - How well do you know your fellow board members?
 - Local League Preparedness
 - Local Priorities Determined
 - Committee Structure
 - Financial Health
 - Fundraising
 - Membership Growing/Stable/Declining
 - See Details on
 - Board PowerPoint**
 - ** [Board publication](#), **Job Descriptions
 - Slide 15, **Board Retreat Primer
 - Slides 9 -11
 - Slide 16
 - Slide 17
 - Slide 18
 - Slide 20
- ** See Resources Handout

Resources Links

- [For the New and Not So New Board Member](#) – LWVC publication describes what it means to be a board member and how to better prepare yourself for board meetings.
- [League Basics](#) – This LWVUS publication provides a good introduction about the League mission, nonpartisan, board, finances, membership, communication, voter service, program and list of additional resources.
- Sample Job Descriptions from [LWVC LLC publication](#), [LWV Sonoma](#) , [LWV San Diego](#)
- [League 101 Board Training](#) – This PowerPoint provides history of the League and its mission, how it completes its mission and what it means to be a board member.
- [21/22 League Calendar](#) – Contains different holidays, special days, and League events
- [LWVC Skits](#) - 22 different skits on various topics that League members can use for roleplaying
- [LWVC True/False Quiz](#) – Different statements about the League that will help stimulate discussion
- [League Lingo](#) – Defines a lot of League acronyms.
- [LWVUS Icebreakers](#) – Several different activities to help board members get to know each other.
- [LWVUS Compass Activity](#) – This activity takes a hour and will help board members understand each board member’s work style
- [Committees](#) – A list of possible committees your League can choose to have to involves more members and get more work done.
- [LWVC Local League Assessment Tool](#) – Lists different areas that each League can assess how they are doing and where they can focus to be a better League.
- [BoardSource Board Retreat Primer](#) – Provides a checklist of items to consider to plan a better Board Retreat.