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)
- Central Orange Co. ...
- East San Gabriel Valley
- El Dorado County
- Kern County
- Merced County
- Napa County
- Palos Verdes Peninsula
- Placer County
- Plumas
- Redding Area
- Riverside
- Santa Clarita
- Santa Maria Valley
- Solano County
- Torrance Area
- Tulare County
- West Contra Costa...
- Western Nevada...
- Whittier
- Woodland

Leagues Middle Tier (72-146)
- Alameda
- Beach Cities
- Butte County
- Cupertino-Sunnyvale
- Davis
- Eden Area
- Fremont/Newark/
- Long Beach Area
- Mendocino County
- Mother Lode
- Mount Baldy Area
- North Orange Co.
- Piedmont
- San Bernardino Area
- San Joaquin County
- San Jose/Santa Clara
- Santa Cruz County
- Santa Monica
- Stanislaus County
- SW Santa Clara...
- Ventura County

Leagues Largest Tier (151-570)
- Berkeley Albany Emeryville
- Diablo Valley
- Fresno
- Humboldt County
- Los Altos-Mt. View Area
- Los Angeles
- Marin County
- Monterey County
- North & Central San...
- North County San Diego
- Oakland
- Orange Coast
- Palo Alto
- Pasadena Area
- Sacramento County
- San Diego
- San Francisco
- San Luis Obispo County
- Santa Barbara
- Sonoma County
- South San Mateo
California Leagues

League Type

Local League % Change in Membership (Jan 21 vs Jan 20)

- 20%-65%...
- 10%-18%...
- 1%-9% increase
- no change
- 1-9% loss
- 10-19% loss
- >20% loss
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 well 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.