



# Environmental Education Association of Oregon

## Checklist for Getting Your House in Order

- Seek out nonprofit support service organizations, web sites, books, executive director networks, list serves, etc. (BoardSource – Formerly the National Center for Nonprofit Boards, Technical Assistance for Community Services – TACS, North Carolina Center for Nonprofits, etc.)
- Hire an Organizational Development Consultant to guide you through the process.
- Create a written organizational profile to describe the mission, goals, and activities of your organization.
- Create a written “case statement” for fundraising.
- Clearly describe and document the role and function of each Board member.
- Write a “Board Member Statement of Agreement”.
- Establish a strategic planning process for your organization and develop a strategic plan.
- Establish an adequate membership and donor giving structure.
- Implement an adequate database to track and report members, donors, gift amounts and dates, etc.
- Learn how to develop a budget, discuss money issues, and make financial decisions as a Board.
- Develop and implement a diversified, strategic and sustainable fundraising plan.
- Develop a detailed financial reporting process and format to accommodate, record and report gifts from a variety of funding sources.
- Have a financial audit performed.
- Develop your web site to accurately reflect your organization.
- Write, have reviewed by legal professional, and approve your organization’s personnel policies.
- Determine, describe and document the role of the hired staff: Maintaining membership database? Fundraising? Public speaking? Newsletter? Specific projects? Planning conference? Serve as liaison to other organizations? Web site? List serve?
- Determine and document what the relationship between the Board and hired staff will be.

- Write the job description and job posting for a hired staff person. (Search procedure – nationwide, interview process, interview panel, interview questions, selection process.)
- Write and submit grant proposals for salary seed money.
- Establish the employee payment process including schedule, taxes and FICA with holding procedures, pay stub for employee designed. (Or, contract with a company to provide payroll services - \$.)
- Discuss and determine resources to address costs above salary expenses: payroll taxes; employee benefits (medical insurance); worker's comp insurance; travel (mileage, plane/train/taxi fares, overnight accommodations, meals, etc.); office and meeting/conference room space; phone, phone service, long distance service; internet connection (additional phone line) and e-mail service; computer and printer; software; fax machine; desk, computer work station, chair; file cabinet(s); office supplies (paper, folders, pens/pencils, staples, stapler, staple remover, paper clips, 3-ringed notebooks, dividers, etc.); business cards; professional development/training; professional membership/dues; etc.

#### Recommended Resources

- Fundraising for Social Change by Kim Klein
- Fundraising – Hands-on Tactics for Nonprofit Groups by L. Peter Edles
- Boards That Make a Difference by John Carver

**Linda Rhoads, Executive Director** of the Environmental Education Association of Oregon (EEAO), is the first full-time staff member of EEAO. Linda worked for 10 years with a Global 500 corporation where she gained extensive education program management experience. She was also responsible for designing, facilitating and leading executive level strategic planning processes. As Program Manager in the North Carolina Office of Environmental Education, she managed a collaborative statewide environmental education program involving numerous government agencies, businesses, non-profits, environmental education centers, teachers and schools. She also worked as an Educational Forest Ranger and as an Environmental Educator with a non-profit environmental education center. Linda has a M.S. in Adult and Community College Education with a minor in Science Education from North Carolina State University and undergraduate degrees in Geography and Psychology from Stetson University.

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