Your board, *in plain language.*

A board isn't a title list. It's the group legally responsible for keeping your mission, your money, and your promises on track. For newer and smaller nonprofits, it's also some of your most important hands.

01 What a board is for

GOVERNING

Setting direction

Approves the mission, strategic plan, budget, and major policies. Decides *what* the organization does and *why*. Hires and evaluates the executive director.

OVERSEEING

Checking the course

Reviews finances and program results, makes sure filings get done, and asks questions when something looks off. Holds the organization, and itself, accountable.

02 When your board is also a working board

With little or no staff, board members also do the work: keep the books, run events, mentor participants, thank donors. That's normal at this stage. The key is knowing which hat you're wearing, and making sure the founder isn't wearing all of them.

Board hat

In meetings. You vote, oversee, and hold the organization accountable as an equal member of the board.

Volunteer hat

Doing tasks. You're accountable to whoever coordinates that work, the same as any other volunteer.

Keep it healthy

- Put roles and expectations in writing before anyone joins.
- Decide in meetings, act between them. When it can't wait, include everyone and record it.
- Never let one person receive, record, and reconcile the money.
- Disclose conflicts, and step out of those votes.
- If the founder is president, another officer handles anything about the founder's own pay or role.

Signs you're drifting

- Meetings are all updates, no decisions.
- The same one or two people do everything.
- No one has reviewed a bank statement in months.
- New members were never oriented.
- Decisions happen in side conversations and never make the minutes.

03 Three duties every member carries

Care

Show up, read the packet, ask questions, review the finances.

Loyalty

The organization comes first. Disclose conflicts; no personal gain.

Obedience

Stay true to the mission, the bylaws, and the law.

© 2026 Rejected Stone Strategies LLC

04 Roles at a glance

ROLE	GOVERNS	WORKS (ON A WORKING BOARD)	LOOK FOR
Chair / President	Leads the board and meetings; partners with the ED; leads the ED's evaluation when they're different people	Builds agendas, runs meetings on time, follows up on tasks, co-signs per policy	Steady facilitator, big-picture, follows through, shares the spotlight
Vice Chair	Backs up the chair; leads board development; second set of eyes on money	Recruits and orients members, tracks terms, co-reviews spending, owns special projects	Dependable, connector, eager to learn, ready to lead
Secretary	Keeps the official record and the key documents; ensures proper notice	Takes minutes; keeps manuals, SOPs, MOUs, and funding contracts; tracks attendance; checks policy fits contracts	Detail-oriented, clear writer, discreet, timely
Treasurer	Leads finance: budget, purchases, controls, and filings	Deposits checks, reconciles the books, tracks grant spending, files reimbursements, works with the CPA	Comfortable with numbers, honest, asks questions, explains plainly
Development Chair	Leads all fundraising: grants, donors, events, earned income, in-kind gifts, partnerships	Finds grants and leads the writing, runs events, grows earned income, manages and thanks donors	Relational, unafraid to ask, networked, persistent, grateful
Programs Chair	Keeps programs mission-aligned, evaluated, and safe	Program point of contact; tells the board and ED what the program needs; checks screening	Mission-close, practical, empathetic, respects boundaries
At-Large	Votes, prepares, carries the three duties	The floaters: a grant, a budget, a plan, a program day, wherever hands are needed	A skill or connection you're missing; reliable team player

05 Habits of a board that works

01 **Share the role and agreement before the ask.** People commit better to what they understand.

02 **Orient every new member within 30 days.** A mentor helps, if you have one.

03 **Name a lead for every area of work,** so the lead isn't always the founder. The full board backs every lead.

04 **Send the packet 5–7 days out,** with a recommended motion for every decision.

05 **Use a consent agenda** so meeting time goes to decisions, not reports.

06 **Check in once a year** with a self-assessment and a retreat.

06 Your free Board Starter Kit

Board Guide Roles, duties, who leads what	**Member Agreement** Expectations in writing	**Agenda & Minutes** One page to run it and record it
Packet Checklist What to send and when	**Retreat Agenda** Half-day and full-day	**Orientation Plan** The first 90 days
COI Disclosure Annual conflict of interest form	**Bylaws Check-Up** What yours say vs. what you do	**Take what fits** Use all of it, some of it, or one page.

What Texas law requires: at least three directors, plus a president and a secretary (who must be different people), and a periodic report to the Secretary of State when requested. Everything else in this kit is a suggestion, sample, or guide. Confirm details with your bylaws and an attorney; this is general information, not legal or tax advice.

© 2026 Rejected Stone Strategies LLC