

# ROAD MAP

## TO SUCCESS

*The Destination...*  
*a high performing nonprofit business*



COMMUNITY FOUNDATION  
*Ocala/Marion County*

[OcalaFoundation.org](http://OcalaFoundation.org)

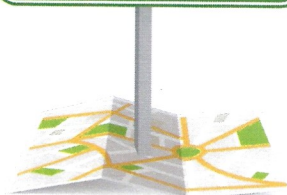




# WELCOME

We are pleased to introduce you to the Roadmap to Success, a compilation of recommendations for nonprofit excellence. The NonProfit Business Council (NPBC), a program of the Community Foundation for Ocala/Marion County (Florida), and the NPBC's Steering Committee created this valuable resource to assist nonprofits in our community and beyond to ensure each nonprofit operates like the business it is. In compiling references from around the country including state and federal statutes, nonprofit experts all over the United States, local nonprofit counselors and many other sources to create the most comprehensive guide applicable to nonprofits in our community. Since 2010, the NPBC has served more than 100 nonprofits each year through professional development, networking, advising and more. This new Roadmap adds another nonprofit tool to serve as a resource, mapping to the destination of a high performing nonprofit business.

## MILE MARKER 1



Follow the mile markers through each chapter to guide you to your destination.



Those indicated by green bullets throughout are **REQUIRED** courses to take.



Those indicated by blue bullets throughout are **RECOMMENDED** courses to take.

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COMMUNITY FOUNDATION  
*Ocala/Marion County*



# DESTINATION 1

## EFFECTIVE GOVERNANCE

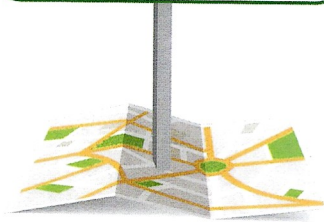
### CHARTING THE COURSE

A nonprofit board of directors should deliver elevated leadership, support, direction, and oversight, and ensure suitable financial and human resources. When effective management of those resources exists, 501 (c)(3) nonprofits excel in accomplishing their missions and impacting their communities.



## ROLES OF THE BOARD OF DIRECTORS

### MILE MARKER 1



### SETTING STRATEGY

- Board of Directors must consist of three or more individuals with the number specified in the organization's articles of incorporation. (FL Statute: 617.0803)
- One board member is required to prepare meeting minutes of the directors' and members' meetings. (FL Statute: 617.0840)
- The board establishes and promotes the mission and vision of the organization.
- Creates and reviews bylaws.
- Manages and signs conflict of interest disclosures among board members where transactions of financial benefit are disclosed and are only authorized, approved or ratified by most of the board of directors who have no relationship or interest in the transaction. (FL Statute: 617:0832)
- Reviews policies and procedures for the organization.
- Encourages strategic thinking and unified communication to maintain healthy board culture.
- Builds a board with varied experiences, backgrounds, skills and cultures.
- Provides new board member orientation led by board leadership within three months of new board member accepting position.
- To ensure strong leadership and accountability, the organization should engage in succession planning for planned and unplanned times of transition. The plan should include board leadership, CEO and high-level staffing positions.

