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Nonprofit Executive Systems Toolkit Preview

This preview introduces the Nonprofit Executive Systems Toolkit for executive directors and their teams. It includes a description of the package and an example to review before purchase.

This toolkit connects five recurring tasks: deciding who can act, delegating a result, reviewing progress, reporting to the board and agreeing board support.

How this saves you time

The tools keep agreed responsibilities and next steps together, so staff can refer to them when preparing meetings and reports. Each task identifies the person responsible, due date, and information needed to confirm completion.

Included	What you receive
Five editable tools	Decision Making Guide; Delegation and Follow Through Tracker; ED and Staff Meeting Agenda; Quarterly Board Update; ED and Board Chair Agenda.
Completed examples	A fictional organization uses the same area of work across all five tools.
Start guide and walkthrough	An editable guide and a self-paced browser lesson with practice and answers.

One example from the package

A Program Lead wants a larger room because 18 people registered and the current room seats 15. The Decision Making Guide permits a room change if accessibility, capacity and cost conditions are met. The lead records the decision, then the team tracks the reminder and staffing work that follow.

Try this with your team

Name one decision that repeatedly returns to the executive director. What could a staff member decide independently? Write the limits, when approval is needed, and where the result will be recorded. Use the completed example to assess whether the guidance will help your team.

The package includes an overview, five editable tools, individual and team meeting formats, a monthly meeting plan, fictional examples, a written walkthrough, and a pilot feedback form. One purchase covers internal use by one organization.

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Completed Decision Making Guide

Completed fictional example • Harbor Community Learning • All names, figures and events below are invented for practice.

Decision and person responsible	Authority and limits	When to ask for approval and where to record it
Move a workshop to a different room Person responsible: Program Lead	Staff decides if the room is accessible, fits approved capacity and creates no new expense.	Ask the executive director for approval if accessibility, participant safety or spending changes. Log the decision in the event plan and notify affected staff.
Add a second workshop session Person responsible: Program Lead	Staff recommends. ED reviews staffing, demand and the existing program budget before deciding.	Bring expected enrollment, staffing coverage and cost. ED records the answer in the Delegation and Follow Through Tracker.
Change an approved organization-wide commitment Person responsible: ED	Use the board approval process if existing policy reserves this decision for the board. Confirm authority first.	Chair coordinates the required process. Record the decision in the approved board record, then communicate implementation instructions.

Example decision

The Program Lead wants a larger room because 18 people registered and the current room seats 15. The alternate room is accessible, has capacity for 24, and is free. Under this example guide, the Program Lead decides and informs the team. If the alternate room costs money, the spending condition changes and the ED must review it.

Review your completed guide

Could a new staff member tell whether to act, recommend or ask for approval? Can the approver identify the exact decision needed? If either answer is no, rewrite the limits before relying on the guide.

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Completed Quarterly Board Update

Completed fictional example • Harbor Community Learning • All names, figures and events below are invented for practice.

Reporting period: April through June of the fictional program year. Prepared by the executive director for the July board meeting. All figures and events are invented.

What the board needs to know

The organization served 72 households this quarter against a goal of 80. Revenue was $96,000 against a budget of $100,000, and expenses were $94,000 against a budget of $98,000. The team is addressing participation and staffing needs; the board is asked to help identify a future workshop venue.

Priority	Results and what they mean	Next steps or board support needed
Program participation	72 households participated against a goal of 80. This quarter’s total is below the goal. Six households requested a different workshop date.	Program Lead checks attendance by session and summarizes participant scheduling feedback by July 12.
Program delivery	18 registrations exceeded the original room’s 15 places. A free room with 24 places was approved. Registration does not confirm attendance or justify expansion by itself.	Executive director reviews staffing before approving another session. Program Lead reports attendance after the workshop.

Finances and concerns

The budgeted surplus and actual surplus are both $2,000 for the quarter. Revenue includes $18,000 in donations received against a $20,000 goal; $5,000 in pledges and a pending $12,000 grant request are excluded from received revenue. A part-time facilitator position is vacant. The executive director will review staffing and available funds before adding sessions.

Decisions and support needed from the board

Board support requested: The chair will identify a board member who can introduce the executive director to an accessible community venue by July 29. Staff will assess the venue and any cost. No board vote is requested in this report; any later proposal requiring board approval will come through the established process.

Supporting documents: quarterly participation summary, finance report comparing actual results with the budget, fundraising report, and staffing update. These are fictional document titles.