

BOARD TRAINING FOR HOMESCHOOL GROUPS PART 2



Board Training for Homeschool Organizations Part 2

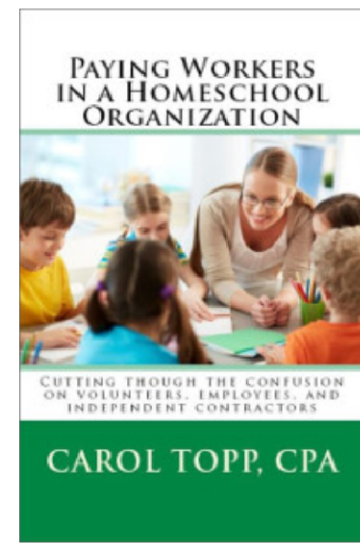
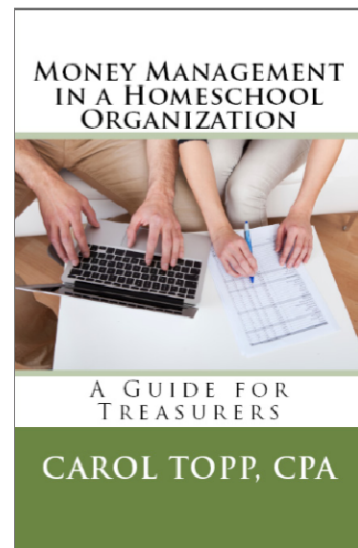
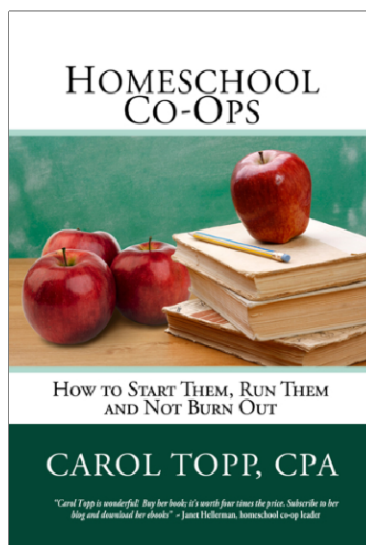
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Agenda

- Nonprofit Characteristics
 - Who is on the Board?
 - Governance v Management
 - Board Structure
 - Board Duties
 - Board Meetings
 - Bylaws
 - Board Personalities
- 

Board Duties

Board duties

Duty of Care: Attend meetings, read financial statements, minutes, etc.

Duty of Loyalty: No conflict of interest, avoid personal advantage



Board duties

Duty of Compliance/Obedience:
Read the bylaws and policies.
Know and obey the required IRS,
state and local laws.

Duty of Management: Develop a
budget, accounting checks and
balances, safety policies, etc.



**Top 10 Tips for Running a
Homeschool Group**

EPISODE #180: YOUR BOARD'S DUTIES

.....
HomeschoolCPA.com/Podcast

Tips for President/Chair

Your job is to set the agenda and run the meetings

- Tips to run a good meeting video

Your job is to delegate, not do everything!

Follow up action items between meetings



Chair

Tips for Secretary



Secretary is the Keeper of the Papers

- Paper files, board member binders and digital files (like Google Workspace for Nonprofits)

Don't transcribe meetings! Summarize decisions and actions

HomeschoolCPA's *Board Member Manual*



Tips for Treasurer

Hire a bookkeeper if needed

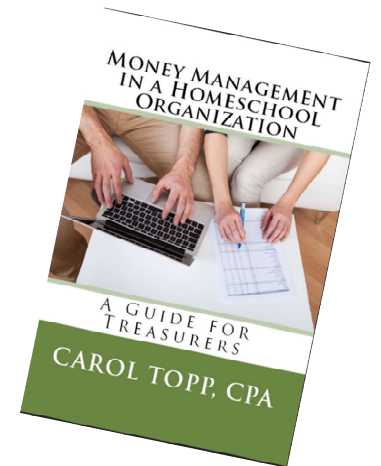
Money Management in a Homeschool Organization book

Use software

- QuickBooks is cheap through TechSoup.org
- Money Minder or Wave are popular



Treasurer



Financial Statements

Financial reports should be delivered to the board every month.

Financial best practices at
HomeschoolCPA.com/Fraud

Free webinar: Financial Reports for
Homeschool Nonprofits
HomeschoolCPA.com/WebinarFR



**FINANCIAL REPORTS FOR
HOMESCHOOL GROUPS**

FREE

A free webinar for homeschool treasurers
HomeschoolCPA.com/WebinarFR

Board Meeting Tips

Board Tips

Minimum of 3 members

Use Committees

Schedule meetings

Keep minutes



Agenda Tips

Reports

- Secretary report of minutes of prior meeting
- Treasurer Report
- Director Report on day-to-day operations

Old Items

New Items

Action Items



Moving the Meeting along

Chair/President's job to move the meeting

Use motions, discussion and call for a vote

Understand personalities

- Some people need to verbally process

Table items until next meeting

Spend time on board training



Board Training in every meeting

Read the bylaws annually.

Update when needed.

Read the policy manuals annually

Go over the budget

Take personality tests

Go over board duties

Do a self assessment

Set one and three year goals

Board Member Manual has ideas for Board Training



Bylaws

Bylaws vs Articles of Incorporation

ARTICLES OF INCORPORATION

Filed with your state
Creates the corporation
High level information

BYLAWS

Internal document
Used by the board to self-govern
Not usually read by members

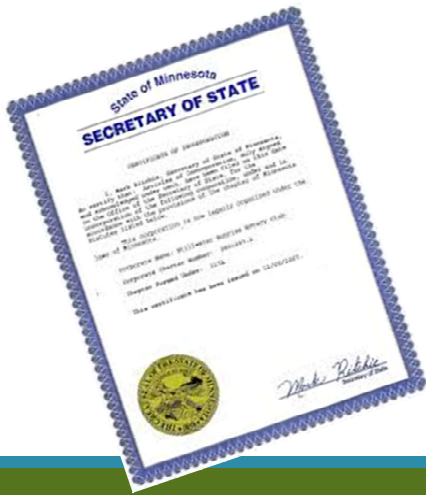


*Articles of Incorporation are like a birth certificate
Bylaws are the Parenting Manual*



Match Bylaws with Articles of Inc

- Purpose statements should match
- Members or not
- Dissolution of assets must match



If a mismatch the Articles prevail over the bylaws



Bylaws

Rules of how an organization will operate

- Are there members? Do members vote? On what?
- How often are meetings held?
 - Can they be held by phone or video?
- How are board members chosen?



More on Bylaws

- Board officers, roles
- Executive Director
- Committees
- Conflict of Interest policy

Sample bylaws at HomeschoolCPA.com/Samples



Board Members' Personalities

Personality Tests

Social Styles test: <https://tracom.com/social-style-training/model>

- Analytic, Sociable, Driving, Amiable

Leadership Style Test: <https://globalleadership.org/quiz>

- Creator, Problem Solver, Vision Caster, Team Builder, Manager or Culture Builder

16 Personalities Test:

<https://www.16personalities.com/free-personality-test>

- Analysts, Diplomats, Sentinels, Explorers,

Enneagram Test:

<https://assessment.youenneagramcoach.com/>



The Analytical Style:
Thoughtful, Reserved &
Slow-paced. Wants
clear and concise data



The Amiable Style:
Friendly, Supportive &
Relationship-driven
Prefers getting to know
people over content

The Driving Style:
Controlling, Decisive &
Fast-paced. Prefers to
stick to the facts

The Expressive Style:
Enthusiastic &
Emotional. Wants to
share their opinions and
feedback

8 Types of Annoying Board Members

1. The Ideas Person
2. The Rambler
3. The Resister
4. The Debbie Downer
5. The Jargonist
6. The Grudge Holder
7. The Completely Oblivious
8. The Printer



<https://www.wildapricot.com/blog/8-types-of-annoying-board-members>

THE IRS AND YOUR
HOMESCHOOL
ORGANIZATION



EMPT 501(C)(3)
OR HOMESCHOOL
ANIZATIONS

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MONEY MANAGEMENT
IN A HOMESCHOOL
ORGANIZATION



A GUID
TREAS

CAROL T

PAYING WORKERS
IN A HOMESCHOOL
ORGANIZATION



CUTTING THROUGH THE CONFUSION
ON VOLUNTEERS, EMPLOYEES, AND
INDEPENDENT CONTRACTORS

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HOMESCHOOL
CO-OPS



HOW TO START THEM, RUN THEM
AND NOT BURN OUT

CAROL TOPP, CPA

*"Carol Topp is wonderful! Buy her books; it's worth four times the price. Subscribe to her
Mag and download her ebooks" - Janet Hellerman, homeschool co-op leader*

Homeschool
Organization
Board Manual

2017-2018

Need help? Contact any of these experts in homeschool boards:

Carol Topp
HomeschoolCPA.com



Becky Abrams
HomeschoolLeaders.com



And more to come...
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