



Key focus areas for

Growing Organizations

*Episode 3: Leadership
Planning & Policies*

ABOUT RIVER NETWORK

River Network grows and strengthens a transformational national network of water, justice, and river advocates.

We envision a powerful and inclusive movement that ensures abundant clean water for all people and nature to thrive. We believe that joy and hope for our planet flows through our rivers.

Meet the network and search our Water Protectors Map on our website!
rivernetwork.org ←



IN PARTNERSHIP

This work is produced by River Network with collaborative support from the Hudson River Watershed Alliance.

The production of these resources has been funded in part by a grant from the New York State Environmental Protection Fund through the Hudson River Estuary Program of the New York State Department of Environmental Conservation.



Department of
Environmental
Conservation

Hudson River
Estuary Program

ORG GROWTH CHECKLIST

For established / growing groups



COMMUNICATIONS / MARKETING

Each group/organization has a different approach to getting their message out: infrastructure such as a website, social media pages, and digital/printed newsletters are all effective platforms for informing the community about your work. In the digital age, evaluate what platforms are accessible for you and align with your outreach goals: social media can be a great tool, but it's often not the only tool organizations are using.

- *What are the key messages your group wants to communicate with the public AND are these messages aligned with your mission statement?*
- *Who speaks on behalf of the organization / whose voice is represented?*
- *How do you define the reach of your communications (is there a key audience)?*
- *Where can staff/volunteers access marketing assets (logo, boilerplate language, branding guidance, images)?*

River Network published an [Inclusive Communications Guide](#) - use it to better understand how your communications can be more accessible, welcoming, and ethical.

FINANCIAL & LEGAL INFRASTRUCTURE

When an organization starts receiving more funding and/or engaging more community members, there are additional financial and legal risks. Thinking through how to manage additional resources and risk is a statutory task for an organization's leadership team.

- *Does the organization carry insurance, or is it listed as additionally insured on another group's insurance policy?*
- *Who is responsible for bookkeeping, reporting, and other fund management?*
- *What internal controls exist to avoid misuse of funds?*
- *Where can staff/volunteers find information about donors and funders?*
- *Are fundraising files up-to-date and accessible to those who need them?*

For more information on insurance coverage, reference information from a trusted partner: [Nonprofit Insurance Alliance](#).

LEADERSHIP: POLICIES & PLANNING

Various elements come together to ensure smooth and sustainable leadership transitions: managing workloads, in-filling capacity, handing off information and duties, and more can be anticipated and well-planned for.

- *Does the organization have by-laws that name how leadership is added or removed from the organization? Or, that name a succession of leadership?*
- *How is/are the leader(s) held accountable for their project file management and record-keeping?*
- *Knowing that healthy turnover of leadership happens every 5-8 years in most groups, are workplans written to accommodate distributed workloads?*
- *Are staff/volunteers exposed to professional development opportunities and/or given opportunities to practice leadership skills, before they might be called upon to serve?*

Check out [this webinar by consultant Karen Strong](#) (Strong Outcomes) from the 2021 HRWA Annual Watershed Conference.

EVALUATION SYSTEMS

Evaluation is an often overlooked tool when considering workplanning and leadership needs. Having a way to constructively evaluate the organization's progress toward its mission, its leadership, and its value in the community will help guide work and identify needs in the future. Evaluation metrics also support fundraising and engagement goals.

- *How are you tracking progress made toward the organization's mission?*
- *What metrics help you understand the organization's impact?*
- *What questions help you understand the effectiveness of your leadership team?*
- *How are volunteers or staff being evaluated to understand their impact?*

Not sure where to start? Check out this [sample board/leadership evaluation template](#), written for nonprofit boards of directors, but easily adjusted for any group.

COMMUNITY ASSESSMENT

Every few years, it's good to take stock of your group's/organization's place in the community. This is often an assessment that happens during a broader strategic planning process, but can be completed internally with some key questions:

- *How does your organization fit into the community's culture?*
- *Who in the community is doing similar/related work to your group?*
- *Who are your allies in the community (collaborators, partners, advocates)?*
- *Does your organization feel unique and relevant to different community groups?*
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TOPICS TODAY:

- Document & knowledge transfer
- Ways to manage transition through by-laws & policies
- Workplanning and budgeting for transitions

THE PROBLEM



29%

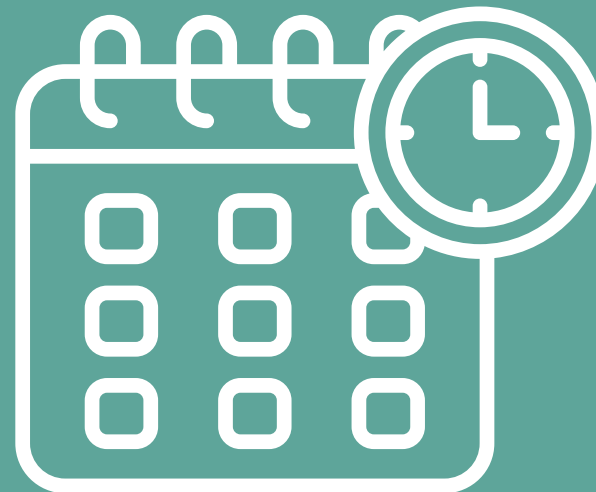
have written
succession plans



40-
50%

anticipate leaving in
the next 5 years

DOCUMENT MANAGEMENT



Program &
Funding
Contacts

Passwords &
Access
Information

Calendar of Key
Meetings &
Events

Service &
Sourcing
Information

Financial & Legal
System Access

Project &
Program Files

KNOWLEDGE TRANSFER

Let others step in to practice:

- Attending funder/partner meetings
- Reviewing and drafting grant applications/reports
- Procuring materials or services
- Shadowing administrative tasks
- Running events or meetings
- Coordinating others on the team



BYLAWS



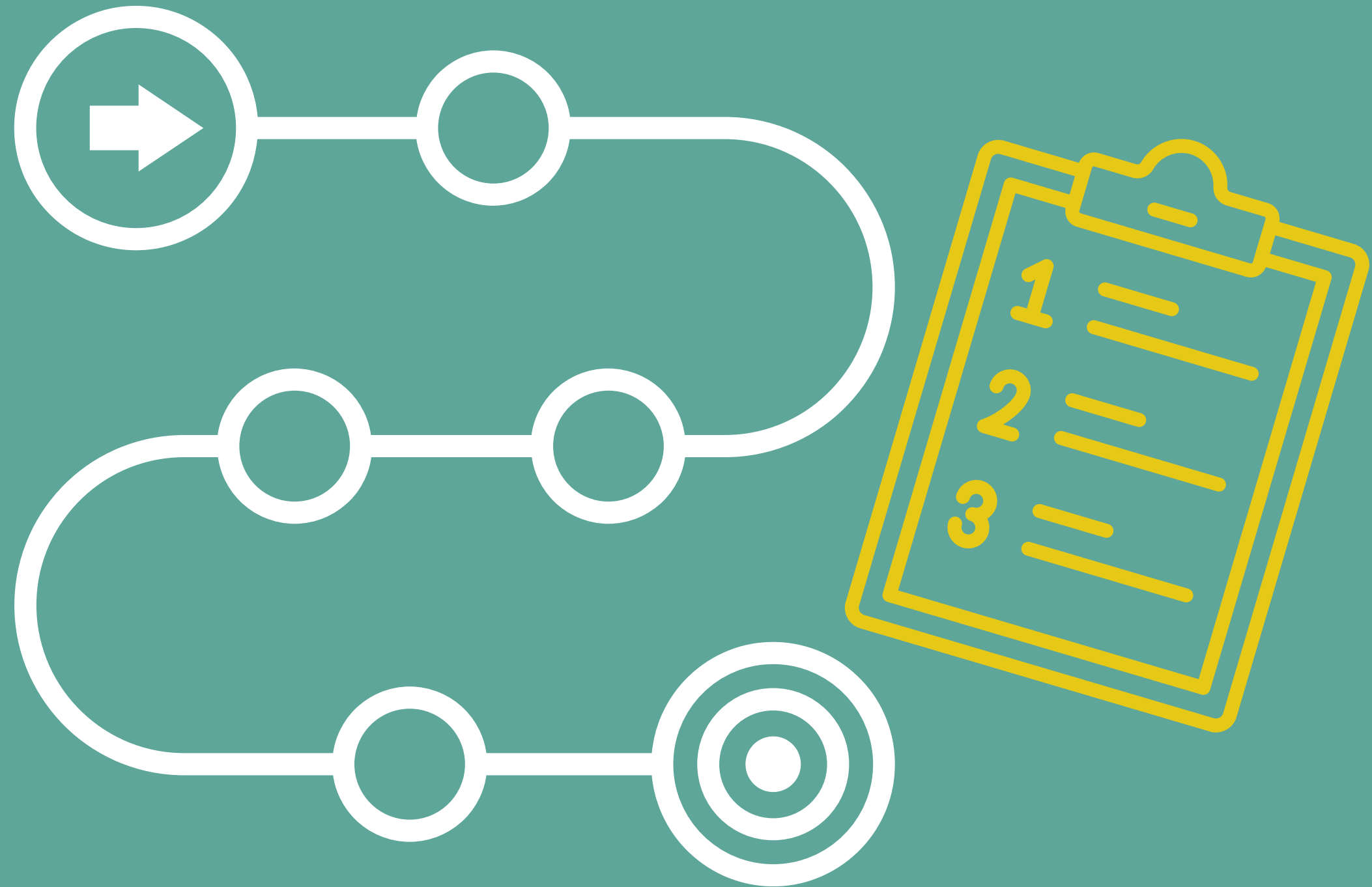
These articles should address:

- Term limits
- Onboarding, offboarding, orientation
- ID'ing & recruiting members
- Committees or other working group structures
- Dismissal procedures

PROCESS, POLICIES, PROCEDURES

Consider the following:

- Welcome process
- Dismissal policy
- Resignation process
- Document management policy
- Exit interview/process



WORKPLANNING & BUDGETING



WORKPLANNING & BUDGETING

TIMELINES:

Delay / extend

SAY NO:

Skill & work alignment

PRIORITIES:

Internal > External

INDIVIDUALS:

Workplans for all!

Organizational Health: Self-Paced Learning Series

To build on the topics listed on the Organizational Health Checklist, River Network produced a self-paced learning series, which features short videos accompanied by downloadable templates and worksheets. This learning series covers all of the topics identified for new/young organizations, or organizations in transition.

Episode 1	Episode 2	Episode 3	Episode 4	Full Playlist and All Downloadable Resources
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Episode 4

The last episode in this series covers two topics that are highly connected: budgeting and workplanning. These tend to be topics of high need for all organizations. Both topics are covered at an introductory “101” level, meant for organizations without this kind of infrastructure already. Available for download are a workplan template and a budget template.

[Download Annual Workplan Template](#)

[Download Budget Template](#)



RECAP

- Knowledge, skill, and information transfers
- Bylaws & other policies
- Budgeting & workplanning for transitions

check out this webinar
from the checklist!



The thumbnail shows a Google Slides presentation titled "BUILDING A RESILIENT ORG STRONG HRWA - Google Slides". The main slide features a photograph of a river flowing through a forest on the left. The text on the slide reads: "Building a Resilient Organization that Lasts" in large bold letters, followed by "Karen Strong" in green. Below that, it says "Hudson River Watershed Alliance Conference", "Aligning Actions for Clean Water", and "October 28, 2021". At the bottom right is the logo for "strong OUTCOMES", which includes a green leaf icon. A small video inset in the top right corner shows Karen Strong, a woman with short dark hair, smiling and sitting in front of a bookshelf.

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THANK YOU!

Find more
information at
www.rivernetnetwork.org

*Explore membership, resources, and join
our newsletter & online community!*

