Coordinate your nonprofit board

using Google products and tools

In this guide you'll learn how to

- Set up and manage a board member communications alias
- Schedule and manage board meetings and other events
- Facilitate more collaborative board meetings with shareable docs
- Organize relevant information into an internal board member site

Nonprofit boards provide critical services to their nonprofit - everything from setting strategy and coaching leadership, to providing fiscal oversight and helping meet fundraising goals. As an office manager, administrator, or nonprofit leader, your challenge is to manage nonprofit board operations to get the most out of your board's guidance and support. This means calendaring board meetings, creating and sharing agendas, reporting on financials, and demonstrating program impact.

This guide will help you manage board operations without it taking over as your day-to-day job!

Before getting started, you'll need

A G Suite for Nonprofits Account

Learn more about how to get your nonprofit signed-up and running on G Suite for Nonprofits, here!

Google Accounts for your Board

First, your board members need Google accounts. Best practice is to give them accounts through your G Suite for Nonprofits account. However, they can also use personal Google accounts.

Working G Suite Knowledge

Finding that no one on your board has used G Suite or associated apps before? Share the G Suite Learning Center for more resources on each G Suite app.

Use **Google Docs**, **Sheets**, and **Slides** for board business and board meetings

Making sure your board members and your nonprofit leaders are prepared for the next board meeting will ensure that the time is well spent. **Using Google Docs, Sheets, and Slides can allow you to prepare board meeting agendas, track minutes, and prepare progress reports and financial models in an easily shareable way.**

SET UP YOUR BOARD MEETING

1. **Open Google Docs, Google Sheets, or Google Slides**. Click the Template Gallery in the top right to find a range of ideas to get you started:
    - Google Docs features templates for **Board meeting notes** and **Project proposals.**
    - Google Sheets includes templates for **Financial statements** and **Annual business budgets.**
    - Google Slides has templates for presentations like **Consulting proposals, Status reports,** and **Case studies.**

2. **Click on the template you want to use to open a new copy**. It will automatically be saved in My Drive, so rename the copy to make it easier to find.

3. **Edit and add content** following the guidance in the [G Suite Learning Center]() for each product.

4. **Add collaborators or viewers by clicking "Share" at the top right**. You can elect whether to add someone with Edit, Comment, or View access. Uncheck the "Notify People" box on the bottom right if you want to add collaborators but aren't ready for them to jump into the doc.

5. **Encourage collaborators to add their comments or suggestions**. To comment into a document, highlight the text or graphic you want to add a comment to and an **"Add comment" button** will appear. Click this button to enter text, and if you want to notify a particular person that you've added a comment you can start typing their email address. Once autofilled, that person will get an email notification that you've commented to them in the document!
6. **To provide track changes in a document**, click the "Editing" button in the top right and change it to "Suggesting." To accept changes as a document editor, click the suggestion and then select the check mark on the top right.

SHARE YOUR MATERIALS

Once your materials are ready for review, you can share them with your board in one of two ways:

1. **Share directly.** Click Share in the top right, in the next window click Advanced. Add your board member alias, click Add Message, and then type in a short note letting your board know what you are sending their way. They will receive an email with a notification about the document. This is the best method for sharing one-off documents or information that the board is already expecting.

2. **Share via email**. If you follow the steps above but uncheck the "Notify People" box before sending, you can silently add your board as viewers to a document without notifying them. Then, you can link to the URL of the document you plan to share in an email to your board. This is the best method for sharing multiple documents at the same time, as you can provide the overview and context in one email to the board.

   If you need to share materials that weren't originally created in G Suite (e.g. a PDF, a Microsoft Word document) you can follow the same process as above by saving the file in Drive and sharing a link to the file with your board. [Click here for more information about Drive compatibility with other file formats]().

Use **Google Calendar** and **Hangouts Meet** to schedule and host board meetings and events

Make sure your board members are prepared by hosting a training for board members across various locations through a livestream. **If you have G Suite, you can use Hangouts Meet to stream a training to members regardless of geographical location. If you don't have G Suite, you can use your YouTube channel to create a live stream on YouTube.**

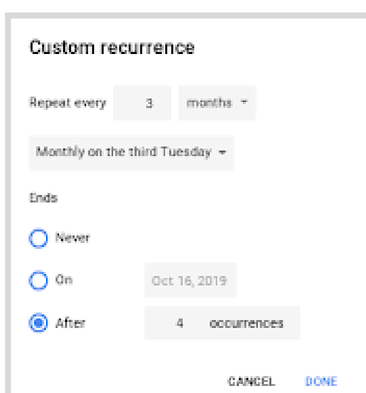
SET UP YOUR BOARD MEETING

1. **First, you'll want to pick a date and time that works well for your board members and your nonprofit leadership**. One option to collect the best time and date is to survey your board members directly by creating and sending a Google Form. There's even a "Find a Time" template you can customize!

2. **Now let's get to scheduling**. On your computer, open Google Calendar. In the bottom right corner, click **"Add" icon** to ⊕ create a new event. Add your event title (e.g. "Quarterly Board Meeting").

3. **If you have multiple calendars, choose the calendar where you want to add the event** from the "Calendar" dropdown menu. For example, if you have a general admin alias like "admin@yournonprofit.org" you could send the calendar invite from there.

4. **Select the date and time** you settled on with your board members at the top. If you can get folks to plan in advance, you can **make the board meeting invite recurring** so that future board meetings are already scheduled (see below for an example of a quarterly meeting).

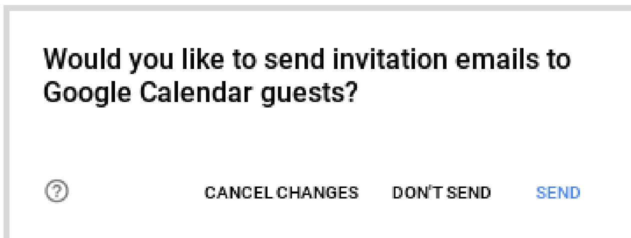


5. **Add a physical location** (if you're meeting in-person) and make sure to click **Add Conferencing > Hangouts Meet so that the calendar invite is populated with a Google Hangouts Meet link**. That way, if board members can't meet in person they can still participate via video call!

6. **Add the board member and nonprofit leadership aliases** you created (see "Set up and manage a Google Group for board member email communication" above!) to the invite list.

7. **Finally, include a note to your board members** about the meeting in the "Add description" section of the invite. You should also **link relevant Google Docs to the calendar invite including the board agenda and meeting docs by clicking the "attach file" icon** . That way anyone opening the calendar invite has all the relevant documents at their fingertips!

8. **At the top of the page, click Save**. If you want to "silently" add the invite to your board member's calendars, click "Don't Send" in the dialog box that pops up (see below).

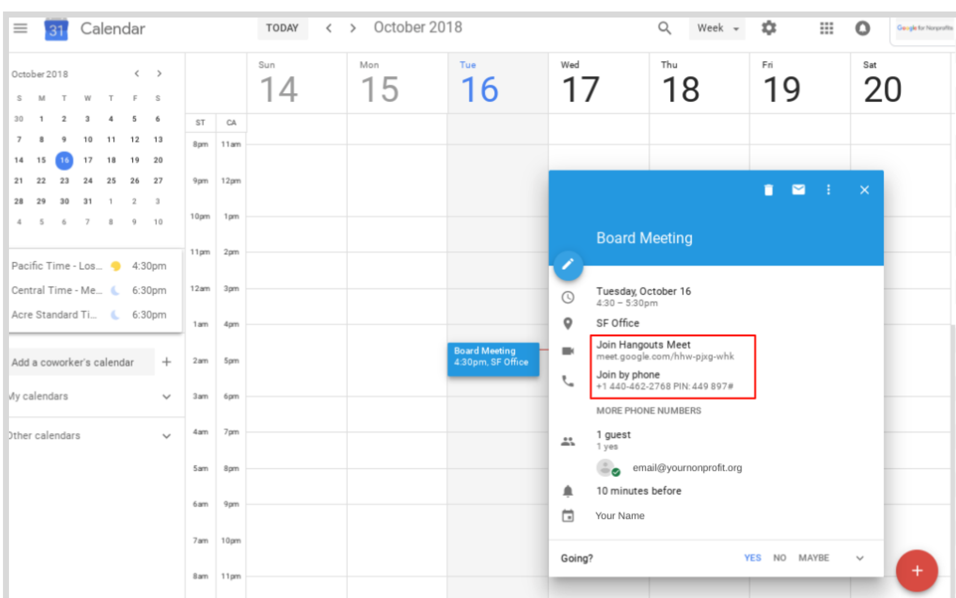


HOST YOUR BOARD MEETING VIRTUALLY

1. **As you get closer to the event, check attendance by reviewing guest RSVPs** in the calendar invite.

2. **If your board members can't all be in the same place, you can still meet "face to face" via video call with Hangouts Meet.** Use the same directions as listed above to create a calendar invite with a Hangouts Meet code.

3. **When your board meeting is set to begin**, open [Google Calendar]() and click the meeting invite. In the box that pops up, **click "Join Hangouts" to join a video call or use the dial-in listed in the "Join by phone" section to call into the meeting**.



4. **Once in your board meeting**, the moderator can use the "Present" function to share their screen and **present documents, slides,** or **sheets**. The moderator can also mute participants if there is background noise from other people on the call.

WHAT IF YOUR BOARD DOESN'T HAVE GOOGLE CALENDAR?

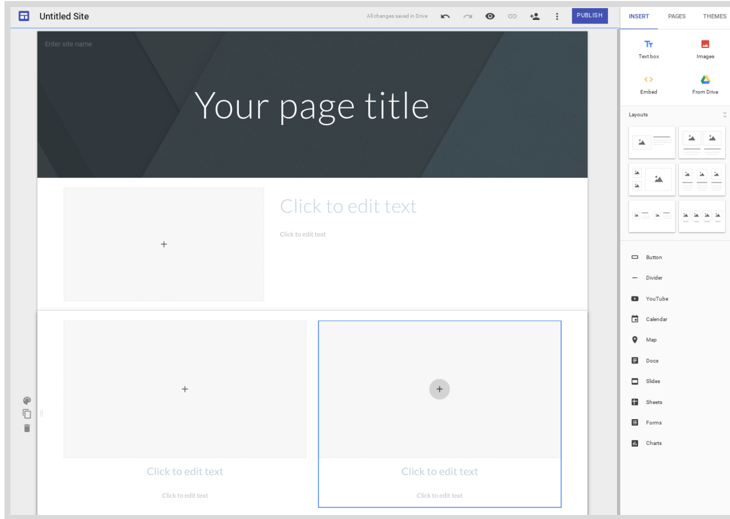
You can still send calendar invites to board members if they are using another calendar client. Your board member will be able to **see the meeting time and Google Hangouts link**, and will be able to click the link to join the Hangout without needing to install any additional software.

Click here for more details on how to plan and hold a meeting using Calendar!

Use **Google Sites** to centralize all board member information in one place

It can be difficult to keep track of important documents via email when busy professionals are getting hundreds of messages to their inbox every day. **To ensure that your board is up to date, create an internal, private website for them to see all of the relevant content in one place!**

1. **Open Google Sites and create a new site** by clicking the **"plus" icon** on the bottom right.
2. **Enter a page title** (e.g. "Nonprofit Board Member Website") and **use the Insert panel on the right-hand side to insert existing layouts or specific text or image fields**. Each section of a Sites page is modular, so you can create content and then move it around as needed.
3. **Create a new page** on your site by clicking the Pages tab and then the add button at the bottom of the panel. **Change the theme (color and font)** for your site by clicking the Theme tab and then scrolling through the options.



4. **Once you are familiar with Sites, think about what kinds of information you want to share** with your board members in one place. Some example pages to consider:
   - **Nonprofit Background** | Provide your board members with background on your nonprofit, links to your annual reports and tax filings.
   - **Board Meeting Calendar** | Create a page and embed a Google Calendar that shows all upcoming board meetings or relevant events.
   - **Board Meeting Resources** | Create a page that embeds the upcoming board meeting agenda and minutes in Google Docs.
   - **Fundraising Goals** | Embed a Google Sheet tracker for each board member's fundraising goals and their progress to date.

5. **Share with collaborators** by clicking the **"Share" icon** in the top right and adding individuals with "Can edit" access.

6. **One your site is ready for prime time, click the "Publish" button at the top right**. By default, anyone within your nonprofit domain (ex. @yournonprofit.org) will be able to view the site. To share specifically with your board members, click the "Share" button and add the board member alias with "Can view published" access.

Click here for more details on how to create an engaging Google Site!

Questions?

Google for Nonprofits Help Center

G Suite Learning Center

G Suite Customer Support

Was this guide helpful?

Let us know what you think and complete this quick survey