

# A Year of Intention Calendar Mapping Guide

Key Conversations to Have Each Year

## #1 Mission, Vision, Strategy

Set time each year to review and/or refine mission, vision statements as well as the current strategic plan (monitor priorities). These three elements guide all decision making for the organization.



## #2 Outreach & Strategic Communications

Identify key communications (annual report, end of year campaign, etc.) and align to board outreach opportunities, ideally guided by the organization's Communications Plan.



## #3 Key Oversight, include Racial Equity Lens

Plan regular time for annual budgeting and board opportunities to monitor program and financial performance. Good idea to maintain a calendar of required filings (IRS, Secretary of State, insurance). Review/update board bylaws and policy as needed as well as the employee handbook. ALWAYS include equity considerations in all oversight.



## #4 Community Building

Make sure your board calendar includes time to build strong working relationships, connect with why each member serves, and develop skills to be a strong board like how to be a strong spokesperson and anti-racism.



## #5 Resource Development

Chief Executive review, board member/ officer elections, review/ board role relative to fundraising plan, annual personal board member financial contributions, board recruitment and transition/ succession planning.



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# A Year of Intention Calendar Mapping Board Checklist

Key Conversations to Have Each Year

**Note the Month to Discuss Here!**

Review your annual calendar of board meetings and note which month you will confirm each key item here



## #1 Mission, Vision, Strategy

Review mission and vision statements

Monitor /refine strategic plan (priorities)

Identify key communications;  
Align to board outreach opportunities

## #2 Outreach & Strategic Communications

Annual budgeting

Monitor program & financial performance, include racial equity lens in ALL oversight

## #3 Key Oversight, include Racial Equity Lens

Annual required filings (IRS, etc.)

Review/ update bylaws & employee handbook

Time for board building & skill development

Chief Executive review

## #4 Community Building

Board elections (members & officers)

Review board role re: fundraising plan

Annual personal board financial contributions

## #5 Resource Development

Board recruiting and transition / succession planning