Checklist for Engaging Your Board

Recruiting and Orientation Process

☐ Does the board have a recruiting process that provides a strong pipeline of mission-driven, diverse board prospects that can support the strategic priorities?

☐ Has the board developed a profile of the ideal board member? Is it based upon fulfilling the strategic plan?

☐ Are board members regularly asked to identify prospects for the board and its committees?

☐ Are there many ways for a prospective board member to become involved with the organization before joining?

☐ Are there clearly articulated expectations for board members? Are they asked to commit to them annually?

☐ Are new board members assigned a board mentor/buddy?

☐ Is there a process to orient and actively engage new board members within their first 90 days?

☐ Do board members understand what the organization does and its impact?

Leadership

☐ Does the Board Chair partner with the CEO to pursue the organization’s strategic priorities? Do they set a positive tone for the board?

☐ Are board members identified and groomed for leadership roles?

☐ Are board members among the largest and most consistent donors of the organization?

☐ Is the board willing and able to frame the key issues and decisions that need to be made around challenges and opportunities?

☐ Does the board act as ambassadors for the organization among partners and the community?

☐ Is there a culture of philanthropy throughout the board? Do they understand they are a critical factor in any successful fundraising campaign?

☐ Does the board have a succession planning process that provides a smooth transition for new board leaders?
Meetings

☐ Is the board using committees and task forces effectively to execute the strategic plan?

☐ Are meeting agendas designed to focus on the organization’s strategic priorities and board engagement?

☐ Are meeting agendas and materials distributed well in advance of meetings?

☐ Are board and committee meetings scheduled for the full year and correspond with the timing of key milestones or decisions?

☐ Is there a willingness to constructively debate important issues among the board?

☐ Is the board willing to challenge the senior staff leadership on their plans and recommendations? Will they ask tough questions?

☐ Are many board members asked to contribute and lead some portion of board and committee meetings?

☐ Are board members actively engaged and contributing their expertise and knowledge at meetings or other board activities?

☐ Is their ongoing board training and education on organizational and governance issues?

☐ Is their time for team building and connecting personally?

Accountability

☐ Does the board assess its own performance regularly and have clear accountability measures that are self-enforced?

☐ Are board members recognized individually and at meetings for their work and impact?

☐ Do board members provide access to their network of relationships to further the mission?

☐ Has 100% of the board made a cash donation?

☐ Is the board large enough to fulfill its roles and responsibilities for oversight? Is it small enough for each board member to understand their role and feel engaged?

☐ Is there a process to reengage or roll off underperforming or difficult board members from the board?

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