

Checklist for Board Improvement

Every board can be better in some way, with reflection by individual members, or the entire board together, as a first step toward improvement. Use this checklist to consider how board education and leadership training/development could strengthen your organization. Apply your own criteria to assess the level of improvement needed.

IMPROVEMENT NEEDED SOME/SIGNIFICANT

BOARD MEMBERS

- | | | |
|---|--------------------------|--------------------------|
| • understand and support the organization’s mission | <input type="checkbox"/> | <input type="checkbox"/> |
| • demonstrate knowledge of the organization’s programs and services | <input type="checkbox"/> | <input type="checkbox"/> |
| • accurately assess effectiveness of programs and services | <input type="checkbox"/> | <input type="checkbox"/> |
| • follow trends and developments related to the organization | <input type="checkbox"/> | <input type="checkbox"/> |
| • assist willingly with fundraising | <input type="checkbox"/> | <input type="checkbox"/> |
| • act as goodwill ambassadors for the organization | <input type="checkbox"/> | <input type="checkbox"/> |
| • read and understand the organization’s financial statements | <input type="checkbox"/> | <input type="checkbox"/> |
| • understand the organization’s income strategy | <input type="checkbox"/> | <input type="checkbox"/> |
| • prepare for and participate in board and committee meetings | <input type="checkbox"/> | <input type="checkbox"/> |
| • communicate that board service is satisfying and rewarding | <input type="checkbox"/> | <input type="checkbox"/> |
| • represent diversity | <input type="checkbox"/> | <input type="checkbox"/> |
| • offer forward thinking to support organization’s future health | <input type="checkbox"/> | <input type="checkbox"/> |
| • have a good working relationship with the board chair | <input type="checkbox"/> | <input type="checkbox"/> |

BOARD CHAIR

- | | | |
|---|--------------------------|--------------------------|
| • has the skills, enthusiasm, energy and time to provide board leadership | <input type="checkbox"/> | <input type="checkbox"/> |
| • has an effective working relationship with the executive director | <input type="checkbox"/> | <input type="checkbox"/> |

BOARD AND EXECUTIVE DIRECTOR

- | | | |
|--|--------------------------|--------------------------|
| • demonstrate a clear sense of direction with strategic planning | <input type="checkbox"/> | <input type="checkbox"/> |
| • demonstrate mutual trust and respect | <input type="checkbox"/> | <input type="checkbox"/> |
| • mutually support a culture of philanthropy within organization | <input type="checkbox"/> | <input type="checkbox"/> |

NEXT STEP: IMPROVEMENT PLAN Make a plan for tackling board roles, composition and leadership qualities that need significant improvement.