

Board Engagement Checklist

Would you like to have an engaged, high-performing board? This checklist highlights the top 10 key areas in which to engage your board so they raise more money, community awareness and ideas! Let's celebrate what's going well and help you identify gaps so you can then develop a plan with specific action steps.

Rate yourself 1 through 4 for each category based on how effectively your board currently operates.

1 – not at all 2 – somewhat 3 – good 4 – great

Don't overthink your answers. Just answer each question based on your immediate response. When you're done, we'll see how you did and start talking about next steps!

	Rating
1. Oversight	
○ Board complies with appropriate bylaws and reporting requirements	
○ All board members have working knowledge of budget	
○ Risk management standards are in place (human resources, property, liability, etc.)	
2. Strategic Vision and Goals	
○ A clear organizational direction is broadly understood	
○ Strategic plan is in place with goals that drive the work	
○ Leaders are adaptable and can adjust direction if needed	
3. Board Composition	
○ An intentional recruitment process aligns with goals	
○ Diversity is a priority	
○ Board size is matches organizational needs	
4. Shared Leadership	
○ Member and officer terms are defined with written position descriptions	
○ Appropriate committees and charters are in place	
○ Positive relationship exists between staff and board	
5. Engagement and Stability	
○ Robust orientation AND onboarding program are in place	
○ Feedback loop is in place for new members	
○ Members are satisfied with their experience and attendance is consistent	
6. Education and Development	

○ A learning environment is valued and demonstrated	
○ Members are encouraged and developed to reach highest level of achievement or leadership	
○ Essential information is effectively communicated (calendars, background for context, program information, challenges, etc)	
7. Performance on Core Responsibilities	
○ Culture of philanthropy is evident (starts with 100% board giving)	
○ Members actively serve as community ambassadors to build awareness and reputation	
○ Members share their expertise and advice	
8. Evaluation	
○ Well-designed self-assessment process is used	
○ Progress to goals is communicated to key stakeholders	
○ Recognition strategies are in place	
9. Succession Planning	
○ All members are aware of leadership opportunities	
○ Clear process is in place to transition officers and committee chairs	
○ Leaders are well-equipped or coached to serve in key roles	
10. Board Culture	
○ Culture of inquiry is encouraged	
○ Commitment to best practices is obvious	
○ Members respect differences in perspective and talent	
Total Score	

I'd love to celebrate what's going well and explore the areas with you where you feel you aren't meeting expectations. Good news – there are simple, effective strategies you can put in place to get a highly engaged board so you can raise more money, ideas and community awareness!

I'd like to invite you to a complimentary coaching session with me so I can support you in this work! This is an opportunity to talk through what's going well and where those gaps are. We'll create a clear action plan to help you create a high performing board. You can simply click on this link to schedule a call with me: www.possibility-cp.com/talk-to-cindi

Let's enhance your board's effectiveness so you can make even greater impact! I look forward to speaking with you soon!

