

Board Report Template

You're the CEO or Executive Director. I'm the board member. Here's a board report template for what I want (and need) to see.

THE OPENING

Bring the work to life for me as a board member. Let me walk in your shoes.

"I knew it had been a good quarter when I sat in this meeting with X, Y and Z. And after we made our case, Z turned to X and had a) a change of heart b) a new decision in your favor c) a "yes" to a big ask or d) some kind of evidence that the tide of your work is turning."

THE MOST IMPORTANT ITEMS TO REVIEW

Like any good executive summary, tell me what I should look out for in the other reports.

"As you read Emily's report, take note of page 3 where she talks about her department retreat and the core strategic takeaways from that."

THE CONTEXT

Give me some context for our organization's work. I joined the board because I care about the *sector*. (If not, you might want to read up on **how to fire a toxic board member**.)

If you attended a conference, don't just tell me you did. Tell me something you learned about the sector. I want to be wiser and smarter about what we're doing. As a board member, I *should* be.

THE QUESTION

Remember: I am not just the person who should be raising money and isn't. (And here's **how to convince board members to raise money.**)

I have a brain, I have skills and expertise and opinions. Put me to work. Get me thinking about that question in advance of the meeting.

Then be sure there is space on the agenda for a discussion of that issue. Don't ask me to consider a question or an issue and then forget to discuss it at the meeting. That's rather counterproductive.

I never said it was easy. Building a strong and effective board that is a real and true asset to the organization is one of the toughest jobs a board chair and an E.D. need to do. And one of the single most important.

THE APPRECIATION

Appreciate our efforts. Thank us in advance for donating the evening or the weekend. It's not just your staff that's been so busy. Highlight the work of some of us who have also "been busy" on behalf of the organization since the last meeting.

You want to create a sense of teamwork between the board and the staff.

Joan Garry Consulting
BECAUSE NONPROFITS ARE MESSY

