



Because the World is Counting on Us.

A TEMPLATE FOR AN OUTSTANDING BOARD REPORT

Overview

One of the biggest requests we've gotten so far in the Nonprofit Leadership Lab is for an example of a format for a CEO report to the board and recommendations for major topics to report on.

We want a streamlined, informative snapshot report.

We DON'T want a report that's built on what each board member wants to hear about and that's too long for anybody to want to read.

What Is a Board Report Really For?

- To communicate, in advance, information that brings board members up to speed about what's gone on since the last board meeting, leading to much more engagement and interaction at the next board meeting
- To give board members a sense of pride and enthusiasm about the work
- To offer one last reminder about what board members committed to do at the last meeting (in case they have forgotten, procrastinated, or both)
- To spark questions and raise issues that the board member can then ask or address in the board meeting
- To ignite enthusiasm in your most important ambassadors
- To give a board member key stories and "material" for marketing the organization to friends and prospects

Before You Start Writing

Remember that you live and breathe this work every single day. Board members pop in and out. They may have been engaged between board meetings but for a busy volunteer, a board book / report is like picking up a book you are reading after having been away from it for a bit. If you can keep the phrase "When last we left you..." in your head, the report will have the right feel to it.

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 our favor c) a "yes" to a big ask or d) some kind of evidence that the tide of our work is turning."

Since Last We Left

You will see that there is a cyclical nature to the board report format I am suggesting. If you leave your board with a clear sense of what will happen before you see them next, you can kick off your board report with a bit of a refresher. *"As I mentioned at our last board meeting, one of our upcoming goals was to kick off our branding process..."* This kind of

opening places the board member back at that last meeting and gives an important sense of continuity about board meetings. They are not separate and distinct but rather an ongoing narrative.

Provide Context

Give me some context for our organization's work. I likely joined the board because I care about the sector. 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.

Outline Key Accomplishments

At our last board meeting, you talked about what was going to happen between then and now. You reminded me about that at the beginning of your report. Now you can give me some "meat." What should we all be proud of? And don't assume I know the "why."

Ask A Question

Remember: I am not just the person who should be raising 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 a strategy that will backfire.

Where We Are Headed

This is what I mentioned above. What can I as a board member anticipate will happen between now and when next we meet. This can be a few key bullets with a bit of explanation.

What We Need From You

Never assume that a board member knows what you need from them. Most board members when asked this question will say, "*Our executive director wants me to give more money and to go find more money.*" So be explicit. Be specific. Make sure it stands out. And follow up so that board members will feel a sense of accountability. Even something as simple as, "*5 Things We Need From the Board Between Now and When Next We Meet*" is great. Or it can be more specific to individual board members.

Thank You

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.

How to Destroy Your Board Report

Even if you follow this template, you can still blow it.

Here are 3 ways you can screw up a board report.

- 1. Send the board report at the very last minute**

This tells board members you are either disorganized or disrespectful of your most important volunteers. Neither message is a good one.

- 2. Think of it as an activity report**

Board members often don't read reports because they are filled with "whats" and not "whys." A report of "whats" will keep your board in the weeds. You want them to fly at a higher altitude.

- 3. Focus on how busy you have been**

I got silly at a board meeting once. During a break, I went through the board packet and did a word search, hunting down all the times I saw the word "busy." I did quite a lot of circling. Beware of the tendency to justify. Your board members assume you are working your butt off and the whole "busy" thing can feel just ever so slightly whiny. Another word you want to avoid.

