Planning & Preparation Cheat Sheet

For Your Next Board Meeting

A lot of things happen between board meetings that you think “I should bring this to the board.” When it comes time to compose that board agenda, how many of those things have slipped away?

This tool for executive directors and board chairs is designed to capture those thoughts and make agenda planning easy and effective. Keep this planning chart handy to jot down questions, issues, and topics you feel deserve board thinking, input, strategy and decision making. Two to three weeks prior to the next board meeting use the chart to inform your decisions when planning the board agenda.

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| Topic Area | What to bring to the board | Urgency:  Vote? Discussion? Info Sharing? |
| Financial status/issues |  |  |
| Strategic Planning Progress |  |  |
| Partnerships |  |  |
| Programs |  |  |
| Board Governance |  |  |
| Events |  |  |