



Board of Directors: Moves Management Tool

Use the following worksheet to define basic expectations for board members and evaluate engagement of your current board of directors. How you define each level of board engagement is completely up to each organization. For specific roles, responsibilities, and leadership activities feel free to refer to page 2 of this worksheet.

Quick Tips:

1. Define which activities are considered basic responsibilities of a board member (1-3)
For example: a level 1 board member attends meeting, a level 2 attends meeting AND contributes financially at a basic level, level 3 attends meetings, contributes financially, AND participates in the annual fundraiser event.
2. Define what responsibilities/activities reflect "leading board members" (4-6)
For example: a level 4 completes all the tasks listed for levels 1-3, seeks sponsorships the annual fundraiser, AND actively serves on a special task force/committee
3. Define what "all-star" board members contribute to your board (7-9)
For example: a 7, 8, or 9 completes all tasks listed for 1-6, chairs a committee, AND assumes a leadership role in planning the annual fundraiser
4. Define an A-list board member (10)!
For example: completes tasks 1-9 AND leads a capital campaign
5. Ask that the group and/or each board member assign themselves a number based on their individual contributions to the board.
6. Evaluate your current board engagement to determine if your board is performing at a basic level, leading board, all-star board, or an A-list board!
7. Brainstorm then implement actions your board can take to move members from basic to leadership roles on your board!

Basic Responsibilities

1. _____
2. _____
3. _____

Leaders

4. _____
5. _____
6. _____

All-Stars

7. _____
8. _____
9. _____

A-List

10. _____

BREAKDOWN OF POTENTIAL BOARD ENGAGEMENT OPPORTUNITIES:

Attend regular board meetings
Makes "thank you calls" to donors
Mentors new board members
Sales tickets to fundraiser
Chairs a committee
Participates in annual fundraiser
Assists with creation of policies/procedures
Writes grants
Organizes/leads a capital campaign

Serves on task force/committee
Writes handwritten "thank you" letters
Volunteers at programs/events
Volunteers to man a booth at community events
Volunteers to man a booth at community events
Assumes leadership role in annual fundraiser
Takes initiative and makes an "ASK"
Participates in a capital campaign
Recruits/screens new board members

Serves as an officer of the board
Provides a list of prospective donors/partners
Secures sponsors
Serves as an ambassador for the org/mission
Represents the organization at local civic orgs
Will "open a door" for an "ASK"
Will accompany board/staff to make an "ASK"
Seeks in-kind resources to support programs/mission
Contributes \$ at a leadership level

Prioritize your board engagement expectations below:

1. _____
2. _____
3. _____
4. _____
5. _____
6. _____
7. _____
8. _____
9. _____
10. _____