

# Six Actions to Take Now to Optimize Your Board for the Year

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Are you taking advantage of the summer to plan for your board's year? During this quieter time, I suggest taking these six actions to set your board up for a successful year to come.

1. **Establish board goals and key dates.** The board chair and CEO or executive director meet to outline board goals for the year and to iron out board meeting, retreat and other key dates etc. It may also be a chance to schedule the chair and executive's regular meetings, at least for the fall.
2. **Plan for the coming year's board meetings.** Theme each upcoming board meeting. Develop a list of committee and staff presenters for each. Discuss possible outside experts or partners you want to invite. Identify issues of governance to be voted on at each meeting (e.g. budget, development plan, strategic plan etc.). Once this is done, two critical next pieces often forgotten are to determine the interactive engagement component for each board meeting. How will your board members participate and share their expertise? The second is to make sure that board members will touch the mission at each meeting.
3. **Determine what training you will offer to your board and when.** The key training modules that 99.9% of boards need are: roles and responsibilities, ambassadorship, storytelling, financial resource development overview, making the ask (soliciting) and optimizing the nomination and onboarding processes. Which of these will be delivered at an orientation? Which will be covered at a retreat? Can you use some board time to offer training?
4. **Review committees and charges.** Do you have the right ad hoc committees or task forces? Are your committee charges accurate? Who is the staff liaison for each committee? What will be the process for assigning board members to particular committees?
5. **Updating board portals and manuals.** All board materials given to new and existing board members should be reviewed and updated regularly.
6. **Make or update your dashboard.** Create a standard performance [dashboard](#) or update your current one to streamline reporting at board meetings.

If you want to prepare and take some stress out of board management and position your board to engage from the beginning of the year, invest time this summer. You will thank yourself during the year!

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