

# Serving on a Board?

## How well do you know the organization?

1. About the **MISSION STATEMENT**:

- a) I can communicate it from memory.
- b) I've seen it before.
- c) That's something the staff knows.

2. About the **MEMBERSHIP**:

- a) Approximately how many members do we serve? \_\_\_\_\_
- b) What is our market share of members compared to potential members? \_\_\_\_\_
- c) What percentage would be a satisfactory retention rate:  75%  85%  95%

3. About the **BUDGET**:

- a) What is the size of the annual income? \_\_\_\_\_
- b) How much do we maintain in reserves? Liquid? \$\_\_\_\_\_ Real Estate Value \$\_\_\_\_\_

4. About the **REVENUE**:

- a) What are the top three revenue generators in the budget?
- b) What percentage of the revenue is generated by member dues? \_\_\_\_\_%

5. About the **STRATEGIC PLAN**:

- a) How many goals (pillars or core competencies) are in the plan? \_\_\_\_\_
- b) For what purposes do we use the strategic plan?
  - Guide the Board  Guide the Committees  Empower the Staff
  - Promote Value to Members  Distinguish Ourselves from other Orgs.

6. About the **GOVERNING DOCUMENTS**:

- a) Which documents are important to read and understand?
  - Bylaws  Polices  Articles of Inc.  Mission  Budget  Strategic Plan

7. About the **PUBLIC RECORDS**:

- a) Which documents are considered public records:
  - Board Packet  Meeting Minutes  Budget  IRS Forms