

KEEPING THE EXECUTIVE DIRECTOR REPORT STRATEGIC

When I was an Executive Director, one of the tasks I dreaded most before each board meeting was writing my report. Not because I didn't have anything to say—quite the opposite—but because I was never quite sure *what* to say or *how* to say it. I didn't want to waste the board's time repeating what committee chairs were already covering in their reports or give them unnecessary operational details. At the same time, I wanted to make sure the board had the information and context it needed to govern effectively and stay focused on mission and strategy.

That's when I started building a template to help me step back and think strategically about what really mattered at that point in time—big-picture trends, mission-critical developments, organizational risks, and areas where I needed the board's attention or support. The template provided a structure to help me organize my thoughts when there were competing priorities pulling me in different directions—or when I was so busy I just wanted to check it off the list and move on.

Each section of the template prompts reflection on timely and relevant issues. Some sections will be more robust than others depending on what's happening at the time. The goal is to surface the information the board truly needs to lead effectively.

The Executive Director Report template is designed to keep the focus where it belongs: mission, strategy, and leadership. More importantly, it ensures you're communicating with your board in a way that builds trust, demonstrates competence, and strengthens your partnership with them. Because when you get that part right, everything else gets easier.

Best Practices When Preparing the Executive Director Report

- Use bullet points and keep it concise
- Avoid duplicating information from committee reports
- Focus on insights and implications, not just activities
- Clearly flag any decisions needed or areas where board input is required

EXECUTIVE DIRECTOR'S REPORT TEMPLATE

1. Mission-Focused Progress

- Key accomplishments since the last meeting
- Alignment with strategic plan priorities or goals
- Milestones reached in programs, services, or community impact

2. Organizational Health

- Staffing updates (e.g., new hires, turnover, morale)
- Capacity or operational challenges
- Systems or infrastructure updates (technology, facilities, etc.)

3. Finance and Fund Development Overview

- Summarize key trends or developments in fundraising and finance
- Highlight strategic implications of financial wins or risks (e.g., major grants, funding gaps)
- Reference Fund Development Committee report for detailed lists of grants and donations
- Provide context on ED's role in donor/funder relationships and needs for board support

4. Cross-Cutting Themes

- Insights that link or synthesize committee work (e.g., how HR issues affect fundraising)
- Organizational learning or shifts in approach
- Systemic concerns or culture-building progress

5. Strategic Issues for Board Attention

- High-level strategic opportunities or threats not covered by committees
- Trends or external factors that could affect the organization
- Decisions or support needed from the board

6. Upcoming Priorities

- What's on the horizon in the next 1–3 months
- Focus areas for staff and leadership
- Board engagement opportunities (e.g., advocacy, fundraising)

7. Thanks

- Always take the opportunity to thank them for the time and effort they bring to the work.