Annual Operational Health Checklist

For Nonprofit Boards and Leadership Teams

Run through this checklist at your annual board retreat. Every item that surfaces a "we don't have that" is an action item for the coming year.

Governance

- ■ Current bylaws on file, reviewed within 3 years
- ■ Board conflict-of-interest policy signed annually
- ■ Clear role delineation between ED and Board Chair
- ■ Executive Director evaluation process documented
- ■ Board recruitment pipeline with 2+ prospects active

Financial

- ■ Operating reserves equal to 3+ months of expenses
- ■ 990 filed on time, posted publicly on website
- ■ Independent audit or review completed annually
- ■ No single funder exceeds 33% of total revenue
- ■ Board Finance Committee meets quarterly

Operations

- ■ Written succession plan for ED and 2 key staff
- ■ Institutional knowledge documented outside individuals
- ■ Data privacy and retention policy in place