Board Governance Checklist

Boards don't need to manage; they need to ask good questions and see the right information. Use this to check your board's oversight.

STRUCTURE

	YES	PARTLY	NO	N/A
Bylaws are current and followed; officer roles are clear.	☐	☐	☐	☐
A conflict of interest policy is signed by every board member each year.	☐	☐	☐	☐
Committees (finance, audit, governance) have written charters.	☐	☐	☐	☐

FINANCIAL OVERSIGHT

	YES	PARTLY	NO	N/A
The board receives financial statements and a cash report at every meeting.	☐	☐	☐	☐
The budget is approved before the year starts and compared to actuals.	☐	☐	☐	☐
Someone on the board reviews bank statements periodically.	☐	☐	☐	☐
Whistleblower and document retention policies are adopted.	☐	☐	☐	☐

MEETINGS AND RECORDS

	YES	PARTLY	NO	N/A
Minutes record decisions, votes, and recusals.	☐	☐	☐	☐
Executive or pastor compensation is reviewed and documented.	☐	☐	☐	☐
The board evaluates itself and the executive at least yearly.	☐	☐	☐	☐

RED FLAGS TO WATCH

- One person controls the money and the reporting
- Financials presented verbally only
- Conflicts not disclosed or recorded
- Minutes missing or rewritten later

BEST PRACTICES

- Use a one-page financial dashboard
- Rotate the treasurer review of bank statements
- Hold one executive session a year without staff

Need a hand putting this into action?

IAG's Board Stewardship Series trains boards to ask the questions that prevent problems.

Talk with an advisor: integrityadvisorygroup.org/contact

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