Table IV:6 – Common Presenting Priorities and Data to Collect

**Board operations**
Collect data about how Board members and leaders:
- Ensure members understand and can perform their roles as members of a governing Board.
- Clarify the roles between the Board and CEO.
- Decide what new expertise is needed on Board.
- Ensure that members attend and participate fully in Board meetings.
- Set direction, make decisions and solve problems among themselves.
- Ensure that the organization has a clear purpose, vision and strategic priorities, and also how members ensure that those are being followed effectively and efficiently.
- Ensure that the CEO is performing his or her role competently.
- Ensure that they are conducting their operations in a high-quality manner each year.
- Understand how the quality of Board operations affects the work of other positions and management functions in the organization.
- Believe that issues exist? How do they affect the organization? What should be done?

**Strategic planning**
Collect data about how Board members and leaders:
- Ensure that the planning process suits the nature and needs of the organization, and considers continuous feedback about the quality of all major systems in the organization.
- Clarify the overall purpose, vision and values of the organization.
- Ensure that strategic goals and objectives are established for the organization.
- Ensure that all members of the organization and its external stakeholders are aware of the organization’s purpose, vision, values and goals.
- Ensure that the organization’s resources are focused and aligned toward the purpose, vision and goals of the organization.
- Ensure that each Board member, Board committee and employee position clearly knows how they contribute towards the purpose, vision and goals of the organization.
- Ensure that progress is being made in an effective and efficient fashion toward the purpose, vision and goals of the organization.
- Understand how strategic planning affects all other systems in the organization.
- Believe that issues exist? How do they affect the organization? What should be done?

**Teamwork**
Collect data about how leaders and supervisors:
- Identify what expertise is needed in the organization.
- Specify roles and responsibilities for each position.
- Set direction, make decisions and solve problems with employees.
- Evaluate performance, or achievement of goals, in the workplace.
- Organize positions in the organization, including into overall teams.
- Organize teams, clarifying the purpose of team, results to be achieved by team, resources to the team, and how team members will communicate.
- Ensure that key employees are aware of each others’ roles and value to the organization.
- Understand how the quality of their work affects all other systems in the organization, especially the work of other positions and services to customers.
- Believe that issues exist? How do they affect the organization? What should be done?
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<th>Table IV:6 – Common Presenting Priorities and Data to Collect (Cont.)</th>
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**Financial management**  
Collect data about how Board members and leaders:  
- Know what the organization, including its central offices, products and services, costs to operate.  
- Know how much money can be generated from the products and services.  
- Know how much money is needed to be raised from investors or fees from services.  
- Are sure of how, and where, all of its monies are being spent.  
- Are sure that its monies are being spent wisely, ethically and legally.  
- Are sure that money is available to pay current bills or any sudden expenses that arise.  
- Are sure that financial management activities are being conducted in a highly efficient and cost-effective fashion.  
- Understand how the quality of financial management affects all other systems in the organization, especially tracking and control of adequate resources for all activities.  
- Believe that issues exist? How do they affect the organization? What should be done?

**Business planning for each product or service**  
Collect data about how Board members and leaders:  
- Are sure that there really is a need for that product or service in a particular target market.  
- Have clearly identified the needs and wants of that target market.  
- Are sure that the product or service will indeed benefit its target market.  
- Have made a clear description and specification of the product or service.  
- Have identified how the product or service should be managed.  
- Have identified the costs to develop and sell the product or service.  
- Have identified the likely sales, or revenue, for the product or service.  
- Have identified any deficits (expenses over revenues) and how they will be addressed.  
- Have identified the financial break-even point for that product or service and when it will occur.  
- Believe that issues exist? How do they affect the organization? What should be done?

**Advertising and promotions for each product or service, and overall public relations**  
Collect data about how Board members and leaders:  
- Know how to communicate with tools (flyers, radio, TV, etc.) that match the preferred communication styles of each target market.  
- Know that the unique features and benefits of each product or service are realized by its particular target market.  
- Will have identified likely sales leads and contacts for generating sales.  
- Will ensure that sales and customer service are of the highest quality.  
- Will ensure effective follow-up and continued sales from each lead.  
- Will evaluate the results of advertising and promotions for each product or service.  
- Know that the overall public image is effectively conveyed (this data is in regard to effective public relations for the entire organization, including all products and services).  
- Believe that issues exist? How do they affect the organization? What should be done?