

Creating An Executive Summary

The purpose of the Executive Summary is to provide a report to the Board of Directors summarizing administration, staffing, finances, and service delivery for the time period since the last board meeting. Issues may be noted under sub-headings such as programs and services, finance, human resources, administration, and community partnerships.

This report is used for a variety of purposes: to provide an update on a project the board is already monitoring, to get action from the board, and introduce topics for discussion that the President/Executive Director wants the board's input on—each of these should be clearly labeled for clarity in your report.

Report Format

Your board members are busy people and having a clear and concise Executive Summary communicates that you value them. You should keep your board meetings to 1.5 to 2 hours if possible, so keep this in mind when creating your report. An Executive Summary should be a maximum of 2 pages (front and back). Additional materials should be kept to a minimum but can be included as attachments (and noted and labeled in the Executive Summary).

The heading of the report should state who the report is coming from, the time frame the report covers, and who the report is going to. Title the report to indicate what the report discusses, so that readers can quickly file it and relocate it.

Use headers and bullets within the reports to enable board members to scan through the topics and find the relevant information. Be clear about what you are presenting for discussion, updating, information, or decision. You can include an introduction and a summary section, to give the board an overview of the information within the report.



Note: Help your Board members know what you are asking them to do. Label items: handout, information, discussion, action (1 or all 3) depending on the result you want.

Report Content

Use your board meeting to tap into the wisdom, advice and guidance of your board members. So to avoid devoting unnecessary time to aspects of the organization that are operating normally. You should only spend a sentence or two on operations of the organization that are not exceptional in any way. Compare what was planned to what happened. Mention any acquisitions of property or new assets, employee issues, including relevant new hires or terminations, and new programs, services or products. Don't leave out negative outcomes.



Review the minutes from the last board meeting. If there are any items that you need resolution on, include and note them in your report.

This entire written narrative should be 2 pages plus attachments as necessary. Note and label the attachments in your report content. Make it easy for the board members to see how hard you are working and what you most need their help with. **This is the opportunity for you to brag about how amazing your staff team is and that you are indispensable to the organization!**

SAMPLE LAYOUT

**Mickey Mouse Foundation
Executive Summary
Prepared by Donald Duck for the Board of Directors
For the Period: May 15-June 15, 2021**

A. Short Intro Paragraph (highlighting key issues)

B. Headings:

- Programs and Services -- new programs, services or products, counseling hours
- Staffing – staff hires and departures, employee issues
- Marketing & Outreach – key meetings with partners, opportunities
- Fundraising – key meetings with potential and current donors, reporting on goals
- Finance – unusual issues, funding requests
- Administration – facilities, issues not covered in Finance section
- Key Accomplishments – successes the Board should be aware of and have not been captured elsewhere in the Executive Summary
- Matters for Noting – any other issues which the President/Executive Director wants to bring to the Board’s attention for information and don’t typically require discussion. This may include visitors to the organization, conferences & professional development, community issues and events, or significant meetings which the President/Executive Director was involved in.

C. Short Conclusion Paragraph (what is the key thought to emphasize)