

The Board Reporting Template

What your board actually needs to see every month — and nothing else

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Most board reports are either too long (a 40-page packet no one reads) or too shallow (a 3-sentence update that tells the board nothing useful). An effective board report takes 15 minutes to prepare and 10 minutes to read. Here's the exact format.

THE 6-SECTION MONTHLY BOARD REPORT

Section	Length	What to Include	Why This Section Matters
1. Program Snapshot	½ page	<ul style="list-style-type: none"> • Clients served this month (vs. last month, vs. target) • Top program highlight • One challenge and the plan to address it 	Keeps board grounded in mission impact — not just finances.
2. KPI Dashboard	½ page	<ul style="list-style-type: none"> • 5–8 key metrics with current vs. target • Traffic light: Green / Yellow / Red • One-line explanation for any Yellow or Red 	Gives board members a scannable operational picture in under 60 seconds.
3. Financial Summary	½ page	<ul style="list-style-type: none"> • Revenue vs. budget (month + YTD) • Expenses vs. budget (month + YTD) • Cash position and months of reserve 	Board has fiduciary responsibility. They need current numbers, not last quarter's.
4. Compliance & Risk Update	¼ page	<ul style="list-style-type: none"> • Any open compliance items or findings • Grant report deadlines in the next 30 days • Any HR, legal, or operational risks to flag 	Most boards only hear about compliance after it's a crisis. This section changes that.
5. Priorities for Next 30 Days	¼ page	<ul style="list-style-type: none"> • Top 3 operational priorities with owner and due date • Any board action items needed • Upcoming decisions requiring board awareness 	Keeps the board forward-looking and clarifies when their input is actually needed.
6. ED Notes	¼ page	<ul style="list-style-type: none"> • What's going well that the board should celebrate • What's keeping you up at night • What support you need from the board right now 	This is the most important section. A board that doesn't know what the ED needs can't help.

QUICK BOARD REPORT HEALTH CHECK

Report is 2 pages or less	<input type="checkbox"/> Yes <input type="checkbox"/> No
Includes current financial data (not last quarter)	<input type="checkbox"/> Yes <input type="checkbox"/> No
Has a KPI section with traffic light indicators	<input type="checkbox"/> Yes <input type="checkbox"/> No
Includes at least one compliance or risk item	<input type="checkbox"/> Yes <input type="checkbox"/> No
ED explicitly states what support is needed	<input type="checkbox"/> Yes <input type="checkbox"/> No
Sent at least 48 hours before board meeting	<input type="checkbox"/> Yes <input type="checkbox"/> No

A board that is well-informed is a board that can actually govern. If your board is disengaged, check the quality of your reports before you question their commitment. In most cases, the report is the problem.

Ready to close the gaps?

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