

Annual Membership Checklist



Help your board use AGB membership fully while strengthening governance, fiduciary oversight, and strategic leadership.

Activate AGB Resources

- ☐ Review and update your **AGB membership roster**.
- ☐ Ensure all roster members can **log in to AGB.org**, are receiving *Trusteeship* magazine, and are opted in to AGB emails.
- ☐ Connect with the **AGB concierge** to schedule a member benefits overview for your board.
- ☐ Get Your **Governance Practice Score and Development Plan**.

Build a Strong Governance Foundation

- ☐ Encourage all board members and those working with the board to complete **Board Member Orientation** (either for the first time or as a refresher every two to three years).
- ☐ Complete a **Governance Checklist**, customized for independent and public colleges and universities, foundations, and systems.
- ☐ Encourage board professionals to pursue the **Board Professional Certificate Program™**.
- ☐ Review the **Principles of Trusteeship** and reaffirm board roles, responsibilities, and fiduciary duties.
- ☐ Conduct a **board chair–president/CEO alignment** conversation (goals, expectations, priorities) and consider applying for an **Institute** to further build the relationship.
- ☐ Identify two to three priority governance challenges for the year and share related AGB resources with your board (find them in the **AGB Knowledge Center**).
- ☐ Hold a **board retreat** or workshop (consider third-party expert **facilitation**).

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Identify Strengths

- ☐ Complete the **AGB Board Performance Survey**.
- ☐ Review results as a full board (not just within a committee).
- ☐ Schedule a **One-Hour Governance Consultation** to interpret results and identify opportunities for governance improvement.

Engage in Learning and Peer Exchange

- ☐ **Send a group** to the National Conference on Trusteeship, the Foundation Leadership Forum, or the Board Professionals Conference.
- ☐ Participate in **webinars** or **peer-to-peer conversations**.
- ☐ Ensure your board chair and president/CEO attend an **AGB Institute** (every two to three years or when new individuals step into these roles).
- ☐ Debrief learnings at a board meeting: What did we learn? What will we change?

Have questions or need help? Contact **concierge@AGB.org**.