Volunteer Commitment Worksheet

As we talk about best practices for volunteers, here's a worksheet to complete. Be prepared to share your answers.

What makes an excellent board? When is your current board at its best?

Be clear on purpose. Why do you volunteer at your credit union? How does it serve you?

Cultivate a climate of trust. What keeps you from fully sharing your ideas, thoughts, and concerns?

Engage in open dissent. How do you encourage dialogue?

Commit to 80/20. Rate yourself from 1-5 (one being never and five being always) on this question, how likely are you to commit to spending 80% of your board time on future-thinking (windshield) and 20% to past-thinking (rearview)?

Ensure individual accountability. Are you committed to learning more about the credit union industry and what are you doing to build your knowledge base? Do you fully read your board packet prior to coming to the meeting?

Engage in succession planning. Are you actively working on succession planning for your CEO? How about your board?

Recruit with intent. Do you have a board assessment tool? Are you working to find board members to fill needed gaps?

Onboard effectively. What processes do you have to onboard new board members?

Take time to self-evaluate. Do you regularly (at least annually) evaluate your board using a self-assessment tool?

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Repeat all the steps above. Is your board clear on its purpose, cultivating trust, engaging in open dialogue, committed to strategic thinking, taking individual accountability, engaged in succession planning, recruiting with intent, onboarding new board members, and evaluating itself?

Engagement Activity

Commitment statement. Create a personal commitment statement that articulates what you are willing to do to ensure that your board is high-functioning and effective.