

# GOVERNANCE 360: FROM MINOR CHANGES TO COMPREHENSIVE REVIEWS

## Key Takeaways

- 1.) Do a needs assessment and analysis to know what is driving the decision to conduct a governance review, such as:
  - a) a crisis
  - b) a planned/prescribed initiative
  - c) an opportunistic circumstance
  - d) a combination of the above
- 2.) Be clear on and understand what, exactly, good governance means.
- 3.) Understand the culture of your association and who the real decision-makers are.
- 4.) Make sure you thoroughly review your governing documents, including your Articles of Incorporation.
  - This is so that when you want to make changes, they are in the correct document and do not conflict with other governing documents.
  - Conduct the documents review in advance of the meetings with members so you know what you need to discuss and where it lies as you are proposing changes.
- 5.) If you know you're going to undertake a governance review—and you have the luxury of planning—bring your entire staff together and make sure they understand the vision from the outset.
- 6.) Understand fiduciary, and ensure that you don't create a structure that conflicts with your fiduciary.
- 7.) Make sure you have a Communications and engagement plan to back up proposed changes.
- 8.) As you move from one association to another, keep in mind that just because something may have been extremely effective at your old association, it does not mean the same will work in your new organization.

