

President Self-Check Checklist

A Governance Readiness & Accountability Tool for Board Presidents

Prepared for: Board President | Date of Issue: August 2026 | Version: 1.0

This checklist is a governance readiness and accountability tool designed to support Board Presidents — both those newly onboarded and those already serving in the role. It is structured to mirror the organization's Treasurer Self-Check Checklist and is intended to be completed individually, reviewed with the Governance Chair or Executive Director, and revisited annually or following a significant governance transition. Work through each section honestly and use the Reflection Prompts to guide deeper self-assessment. This document is confidential and for internal governance purposes only.

SECTION 1

Role Clarity

Understanding what the President role is — and is not — is foundational. Use this section to confirm you have internalized the scope of your authority and responsibilities.

- ☐ I have read and understand the President's role as defined in the organization's bylaws and governance policies.
- ☐ I can clearly distinguish between my role as Board President and the role of the Executive Director/CEO (if applicable).

- ☐ I understand that my authority is exercised collectively through the board, not unilaterally.
- ☐ I have reviewed the board's governance policies, including conflict of interest, confidentiality, and code of conduct.
- ☐ I know which decisions require full board approval versus those delegated to the President.
- ☐ I have introduced myself to all board members and senior staff in my capacity as President.
- ☐ I understand my role as the primary liaison between the board and the Executive Director.

◆ **Reflection Prompt**

"Can you articulate your role boundaries in a 60-second conversation with a new board member?"

SECTION 2

Governance vs. Operations

One of the most common pitfalls for new Presidents is blurring the line between governing and managing. This section ensures you are stewarding strategy, not supervising staff.

- ☐ I understand that the board sets policy and strategy; staff execute day-to-day operations.
- ☐ I do not direct staff members directly — all operational direction flows through the Executive Director.
- ☐ I am familiar with the organization's current strategic plan and can speak to its key priorities.

- ☐ I know the distinction between a governance matter and an operational matter, and I redirect appropriately.
- ☐ I have reviewed the board's delegation of authority matrix (or equivalent policy).
- ☐ I have discussed governance-vs-operations boundaries with the Executive Director.
- ☐ I can identify at least three examples of issues that belong at the board table versus at the staff level.

◆ **Reflection Prompt**

"In the last month, did you find yourself drifting into operational decisions? What would you do differently?"

SECTION 3

Annual Compliance Rhythm

The President plays a key role in ensuring the organization meets its legal, regulatory, and governance obligations on schedule. This section confirms you know the annual compliance calendar.

- ☐ I know the organization's fiscal year-end date and the associated reporting deadlines.
- ☐ I am aware of all annual filings required (e.g., CRA T3010 for charities, corporate annual returns, provincial filings).
- ☐ I have confirmed that the board's annual review of key governance policies is scheduled.
- ☐ I know the deadline for the annual audit or review engagement and have confirmed the auditor/reviewer is engaged.

- ☐ I understand the annual general meeting (AGM) requirements, including notice periods and quorum rules.
- ☐ I have reviewed the organization's insurance coverage and know when it renews.
- ☐ I am aware of any grant compliance reporting deadlines the organization is subject to.
- ☐ I have confirmed that director terms, elections, and board composition requirements are tracked and up to date.

◆ **Reflection Prompt**

"If a board member asked you today when the next major compliance deadline is, could you answer confidently?"

SECTION 4

Meeting Cadence & Chair Responsibilities

Effective board meetings are the engine of good governance. As President, you chair the board and set the tone for productive, focused, and inclusive deliberation.

- ☐ I know the scheduled dates of all regular board meetings for the current year.
- ☐ I collaborate with the Executive Director and/or Governance Committee to set meeting agendas in advance.
- ☐ I ensure agendas distinguish between information items, discussion items, and decision items.
- ☐ I am familiar with the organization's meeting procedures (e.g., Roberts Rules of Order or equivalent).

- ☐ I ensure meeting packages are distributed to directors a minimum of [X] days in advance (per policy).
- ☐ I actively facilitate balanced participation and manage dominant voices in the boardroom.
- ☐ I ensure minutes are recorded, reviewed, and approved at the subsequent meeting.
- ☐ I know how to call a special or emergency board meeting if required.
- ☐ I follow up on outstanding action items between meetings.
- ☐ I conduct annual board self-assessments or chair their facilitation.

◆ **Reflection Prompt**

"After your last meeting, did every director have an opportunity to contribute meaningfully?"

SECTION 5

Signing Authority

The President often holds signing authority alongside the Treasurer. Understanding what you can and cannot sign — and when dual signatures are required — protects both you and the organization.

- ☐ I have reviewed the organization's signing authority policy and know which documents I am authorized to sign.
- ☐ I understand which transactions or agreements require dual signatures (e.g., President + Treasurer).
- ☐ I know the financial threshold above which board approval is required before I can sign.

- ☐ I have not signed any document outside my delegated authority without prior board approval.
- ☐ I know how to escalate a signing request that falls outside normal parameters.
- ☐ I am aware of agreements (leases, contracts, MoUs) currently active and when they expire or require renewal.
- ☐ I understand that my signature may bind the organization legally and I exercise signing authority with due diligence.

◆ **Reflection Prompt**

"Do you review supporting documentation carefully before signing, or do you rely solely on staff assurances?"

SECTION 6

Strategic Plan Alignment

The President is the steward of the organization's strategic direction. This section ensures you are actively connecting governance decisions to the strategic plan.

- ☐ I have read the current strategic plan in full and can summarize its key goals and timelines.
- ☐ I ensure board meeting agendas include strategic items, not just operational reports.
- ☐ I monitor and discuss strategic plan progress at each board meeting.
- ☐ I know which strategic goals are on track, which are at risk, and which require board attention.
- ☐ I have confirmed the board's role in the next strategic planning cycle (initiation, review, or refresh).

- ☐ I connect funding, staffing, and program decisions back to strategic priorities when deliberating.
- ☐ I champion the strategic plan publicly with funders, stakeholders, and community partners.

◆ **Reflection Prompt**

"At the last board meeting, how many agenda items were directly tied to advancing the strategic plan?"

SECTION 7

Risk Oversight

Identifying, monitoring, and mitigating risk is a core board responsibility. The President ensures that risk is a standing governance priority — not a reactive afterthought.

- ☐ I have reviewed the organization's risk register (or equivalent risk assessment document).
- ☐ I ensure risk is a standing agenda item or periodic deep-dive at board meetings.
- ☐ I know the organization's top three strategic, operational, and reputational risks.
- ☐ I understand the organization's crisis communication and incident response protocols.
- ☐ I have confirmed that the organization's insurance coverage is adequate and current.
- ☐ I know who is responsible for risk monitoring at the staff level and how risk escalates to the board.

- ☐ I ensure the board receives risk updates as material changes occur, not only at year-end.
- ☐ I have reviewed any audit management letters or significant findings and confirmed follow-up actions.

◆ **Reflection Prompt**

"If a major risk materialized tomorrow, do you know exactly who to call and what your first three steps would be?"

SECTION 8

Relationship Building & External Representation

The President is often the public face of the organization's governance. Cultivating strong relationships with funders, partners, regulators, and the community is a strategic responsibility of the role.

- ☐ I have met or been introduced to key external stakeholders (funders, regulators, community partners).
- ☐ I represent the organization's mission and values accurately and consistently in public settings.
- ☐ I collaborate with the Executive Director on external communications to ensure consistent messaging.
- ☐ I have attended at least one external event or function representing **the organization** since taking office.
- ☐ I maintain respectful, professional relationships with all board members, including those I disagree with.
- ☐ I actively recruit and mentor potential future board leaders.

- ☐ I understand the organization's media policy and know who is the designated spokesperson.
- ☐ I have connected with the President of at least one peer or allied organization.

◆ **Reflection Prompt**

"Who in your network could be a future board member, funder, or advocate for Guardian Accounting?"

SECTION 9

First 90-Day Expectations

The first 90 days set the tone for your presidency. This section is designed to be completed at the 30-, 60-, and 90-day marks. Check off each milestone as it is achieved.



By Day 30

- ☐ I have completed a full orientation meeting with the Executive Director.
- ☐ I have read the bylaws, governance policies, and most recent board minutes.
- ☐ I have introduced myself to all board members and confirmed contact information.
- ☐ I have reviewed the current strategic plan and financial statements.
- ☐ I have chaired or co-chaired my first board meeting.



By Day 60

- ☐ I have met one-on-one with each board member to understand their strengths and concerns.
- ☐ I have reviewed the annual compliance calendar and confirmed all upcoming deadlines.
- ☐ I have established a regular check-in rhythm with the Executive Director.
- ☐ I have confirmed committee structures, mandates, and chairs are in place.
- ☐ I have reviewed and signed all required governance acknowledgements (conflict of interest, confidentiality, etc.).



By Day 90

- ☐ I have facilitated a board goal-setting or priority-setting conversation for the year ahead.
- ☐ I have reviewed the risk register and confirmed the board's risk oversight approach.
- ☐ I have confirmed the board's self-assessment process and schedule.
- ☐ I have identified at least one area where I want to strengthen my governance leadership this year.
- ☐ I feel confident in my role and have a clear picture of the board's priorities for the year.

◆ *Reflection Prompt*

"What is one thing you wish you had known on Day 1 that you know now?"

President's Self-Assessment Declaration

By completing this checklist, I confirm that I have reviewed and understood my responsibilities as Board President of Guardian Accounting. I am committed to governing with integrity, transparency, and a focus on the organization's mission. I understand that this document is a living governance tool and I commit to revisiting it annually or as my role evolves.

President's Name (print):

Signature:

Date Completed:

Reviewed with:

Next Review Date: