

## PURPOSE-TO-AGENDA LINE-OF-SIGHT TOOLKIT

### PURPOSE ALIGNMENT ASSESSMENT

*Rate your board's current alignment (1-5 scale: 1=Poor Alignment, 5=Excellent Alignment)*

#### Mission Connection

- ☐ Every agenda item clearly connects to organizational purpose \_\_\_\_\_
- ☐ Board discussions regularly reference mission and values \_\_\_\_\_
- ☐ Strategic priorities guide agenda allocation \_\_\_\_\_
- ☐ Purpose-driven conversations receive adequate time \_\_\_\_\_

#### Time Allocation Analysis

- ☐ 60% or more of board time focuses on future value creation \_\_\_\_\_
- ☐ Strategic discussions receive priority scheduling \_\_\_\_\_
- ☐ Operational reporting is streamlined and focused \_\_\_\_\_
- ☐ Compliance matters are handled efficiently \_\_\_\_\_

#### Decision Framework

- ☐ Major decisions explicitly reference the organizational mission \_\_\_\_\_
- ☐ Trade-offs are evaluated against stated values \_\_\_\_\_
- ☐ Stakeholder impact is considered through purpose lens \_\_\_\_\_
- ☐ Long-term mission achievement guides choices \_\_\_\_\_

#### Board Engagement

- ☐ Directors understand how their role advances organizational purpose \_\_\_\_\_
- ☐ Meeting discussions energize rather than drain participants \_\_\_\_\_
- ☐ Board service feels meaningful and impactful \_\_\_\_\_
- ☐ Strategic conversations generate excitement and commitment \_\_\_\_\_

Purpose Alignment Score \_\_\_\_ /80

## MISSION FILTER PROTOCOL

### Pre-Meeting Preparation

Every board paper must include a 100-word "Purpose Connection" statement answering:

1. How does this topic advance our organizational mission?
2. Which strategic pillar does this support?
3. What is the stakeholder value creation potential?
4. What happens to our mission if we ignore this issue?

### Purpose Connection Template

Topic: \_\_\_\_\_

Mission Link: \_\_\_\_\_

Strategic Pillar: \_\_\_\_\_

Stakeholder Value: \_\_\_\_\_

Mission Risk if Ignored: \_\_\_\_\_

## STRATEGIC TIME BUDGETING WORKSHEET

### Step 1: Define Your Strategic Priorities

List your organization's top 5 strategic priorities:

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_

### Step 2: Allocate Ideal Time Percentages

Based on strategic importance, what percentage of board time should each receive?

Strategic Priority 1:	_____%
Strategic Priority 2:	_____%
Strategic Priority 3:	_____%
Strategic Priority 4:	_____%
Strategic Priority 5:	_____%
Risk Management:	_____%
Operational Review:	_____%
Governance/Compliance:	_____%

Total: 100%

## STRATEGIC TIME BUDGETING WORKSHEET

### Step 3: Track Actual Time Allocation

For the last three board meetings, calculate actual time spent:

#### Meeting 1 Date:

Strategic Priority 1:	_____%
Strategic Priority 2:	_____%
Strategic Priority 3:	_____%
Strategic Priority 4:	_____%
Strategic Priority 5:	_____%
Risk Management:	_____%
Operational Review:	_____%
Governance/Compliance:	_____%

#### Meeting 2 Date:

Strategic Priority 1:	_____%
Strategic Priority 2:	_____%
Strategic Priority 3:	_____%
Strategic Priority 4:	_____%
Strategic Priority 5:	_____%
Risk Management:	_____%
Operational Review:	_____%
Governance/Compliance:	_____%

#### Meeting 3 Date:

Strategic Priority 1:	_____%
Strategic Priority 2:	_____%
Strategic Priority 3:	_____%
Strategic Priority 4:	_____%
Strategic Priority 5:	_____%
Risk Management:	_____%
Operational Review:	_____%
Governance/Compliance:	_____%

## STRATEGIC TIME BUDGETING WORKSHEET

### Step 4: Identify Gaps

Priority areas receiving insufficient time:

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Areas consuming excessive time:

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Biggest misalignment:

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## PURPOSE CHECK-IN PROTOCOL

### Meeting Opening (2 minutes)

Chair asks: "Before we begin, let's take a moment to reflect on how today's agenda serves our organizational mission and stakeholder value creation."

### Mid-Meeting Pulse Check

"Are we focusing our attention on what matters most for achieving our purpose?"

### Meeting Closing

"How did today's discussions advance our mission? What should we prioritize differently next time?"

## QUARTERLY PURPOSE AUDIT

### Review Questions

- 1. What percentage of our board time was spent on strategic value creation vs. operational review?*
- 2. Which agenda items struggled to connect clearly to our mission?*
- 3. What important purpose-driven topics received insufficient attention?*
- 4. How did our attention allocation align with our stated strategic priorities?*
- 5. What patterns of mission drift are we noticing?*

## PURPOSE CHECK-IN PROTOCOL

### Purpose Audit Template

Quarter: \_\_\_\_\_  
 Total Board Meeting Hours: \_\_\_\_\_  
 Time Category Analysis: \_\_\_\_\_  
 Strategic Development \_\_\_\_\_ hours (%)  
 Risk Oversight \_\_\_\_\_ hours (%)  
 Operational Review \_\_\_\_\_ hours (%)  
 Compliance/Governance \_\_\_\_\_ hours (%)  
 Stakeholder Relations: \_\_\_\_\_ hours ( \_\_\_\_ %)

### Mission Connection Assessment

Strong mission connection \_\_\_\_\_ agenda items  
 Moderate mission connection \_\_\_\_\_ agenda items  
 Weak/unclear mission connection \_\_\_\_\_ agenda items

### Action Items for Next Quarter

1. Increase time allocation for: \_\_\_\_\_
2. Reduce time allocation for: \_\_\_\_\_
3. Eliminate or delegate: \_\_\_\_\_
4. New purpose-driven topics to add: \_\_\_\_\_

## AGENDA ARCHITECTURE TEMPLATE

### **Purpose-Aligned Meeting Structure**

#### ***Opening (10 minutes)***

- Purpose reflection and intention setting
- Review of strategic priorities for context

#### ***Strategic Block 1 (60-90 minutes)***

- Most important strategic priority discussion
- Future-focused value creation topics
- Major decisions requiring board wisdom

#### ***Operational Block (30-45 minutes)***

- Streamlined performance updates
- Risk monitoring and mitigation
- Compliance and regulatory matters

#### ***Strategic Block 2 (45-60 minutes)***

- Second strategic priority
- Stakeholder and culture topics
- Innovation and opportunity exploration

#### ***Closing (15 minutes)***

- Purpose achievement reflection
- Next meeting priority setting
- Action item clarity and ownership



## IMPLEMENTATION TRACKING (YES/NO)

### Monthly Assessment

- ☐ Mission filter applied to all agenda items \_\_\_\_\_
- ☐ Strategic time budget reviewed and adjusted \_\_\_\_\_
- ☐ Purpose check-ins conducted during meetings \_\_\_\_\_
- ☐ Director engagement and energy levels monitored \_\_\_\_\_

### Quarterly Review

- ☐ Purpose audit completed \_\_\_\_\_
- ☐ Time allocation gaps identified and addressed \_\_\_\_\_
- ☐ Agenda architecture effectiveness evaluated \_\_\_\_\_
- ☐ Board purpose alignment score reassessed \_\_\_\_\_

### Annual Evaluation

- ☐ Overall mission advancement assessed \_\_\_\_\_
- ☐ Board contribution to organizational purpose measured \_\_\_\_\_
- ☐ Strategic priority achievement reviewed \_\_\_\_\_
- ☐ Purpose-to-agenda alignment effectiveness evaluated \_\_\_\_\_

## SUCCESS INDICATORS

### Quantitative Measures

- 60%+ of board time focused on strategic priorities \_\_\_\_\_
- <20% of agenda items fail mission filter test \_\_\_\_\_
- Director engagement scores >4.0/5.0 \_\_\_\_\_
- Strategic decision speed improved by 25% \_\_\_\_\_

### Qualitative Indicators

- Directors report high sense of purpose and meaning \_\_\_\_\_
- Management receives clear strategic direction \_\_\_\_\_
- Stakeholders observe consistent mission focus \_\_\_\_\_
- Board discussions generate energy and commitment \_\_\_\_\_