

Board Self-Assessment

Rate your board using the following scale:

4 – Yes! We always do this 3 – We do this a lot of the time 2 – We do this, but inconsistently
 1 – We rarely do this 0 – No, we never do this

RESPECTING THE COMMITMENT TO SERVE ON A NONPROFIT BOARD	
1. The board is composed of persons vitally interested in the work of the organization.	
2. The board understands and can articulate the mission and purpose of the organization.	
3. There is a statement of agreement outlining the duties and responsibilities of board members that all board members sign.	
4. The organization supplies a board manual to all board members that includes, but is not limited to, descriptions of current programs, a list of board members, budget and funding information, bylaws, and personnel policies so that the board members are knowledgeable about the organization's programs and services.	
5. The organization provides an orientation for new board members.	
6. The organization makes training opportunities available for board members to increase skills related to their board responsibilities.	
7. Individual members of the board accept and carry out assignments within the area(s) of their talents and expertise.	
8. Board members follow through on their commitments in a timely manner.	
9. The board has a simple, concise set of bylaws that describe the duties of board members and officers, as well as the procedures by which the board conducts its business.	
10. The board understands its legal liability and ensures the organization complies with federal, state and local regulations.	
11. The board has an explicit Conflict of Interest policy, signed off on by all board members, in which they agree to disclose any real or potential conflict of interest and place the interests of the organization above their own.	
12. The history and mission of the organization are key points of discussion when the board considers organizational direction.	
13. Board members raise questions and share their thoughts and insights freely in the process of arriving at decisions.	
14. The board consistently acts in ways that exemplify the organization's deepest values.	
15. The board provides financial oversight for the organization, including adopting a fundraising strategy that ensures adequate resources, a realistic budget that maximizes use of resources, and an annual review of finances by an outside professional.	
16. The board ensures that contractual funding obligations are fulfilled.	
17. Board members make a generous (<i>self-defined</i>) financial commitment to the organization on an annual basis as well as their commitment of time and talent.	
18. Board members act as ambassadors to the community on behalf of the organization and its clients.	
SUB – TOTAL	

DYNAMIC TEAMWORK: THE BOARD / STAFF RELATIONSHIP	
19. Board and staff members are clear about their respective duties and responsibilities.	
20. Working relations between the staff and board are characterized by mutual respect and good rapport.	
21. Working relations between the board chair(s) and the executive director are strong and productive.	
22. The board monitors and evaluates the performance of the executive director on a regular basis.	
23. At least once a year the board asks the executive director to articulate his or her vision for the organization's future and strategies to realize that vision.	
24. The board understands the role that volunteers play in the organization and the organization's philosophy of volunteer management.	
SUB – TOTAL	

BUILDING A STRONG BOARD	
25. The board is representative of its constituency with regard to race, class, gender, religious affiliation, sexual orientation, etc.	
26. There is a balance of new and experienced board members to guarantee both continuity and new thinking.	
27. Board members have the combination of knowledge and skills necessary to carry out their work.	
28. There is a limit to the number of consecutive terms a member can serve on the board. (No life terms!)	
29. The organization has a pool of potential board members identified for the future.	
30. New board members are recruited and selected using a thorough review process.	
31. The board has a mechanism (such as an executive committee) for handling matters that must be addressed between meetings.	
32. The board elects a chair (or co-chairs) to provide leadership and coordinate the ongoing work of the board and its committees.	
33. The board has active committees with specific assignments and responsibilities.	
34. Committees complete assigned tasks in a timely manner.	
35. Committee assignments are reviewed and evaluated periodically.	
36. New leadership is emerging consistently from the board and its committees.	
37. The board has a clear policy on the responsibilities of board members in fundraising (all board members are involved in some aspect of fundraising for the organization).	
38. There are regularly scheduled board meetings at least 4 times a year.	
39. Meetings begin and end on time as per agreed-upon schedule.	
40. There is adequate preparation and distribution of material, including agendas, study documents, etc., in advance of board meetings.	
41. Board meetings deal primarily with policy formulation; program, financial and long-range planning; financial review; and evaluating the work of the organization.	
42. Minutes of board and committee meetings are written and circulated to the members.	
SUB – TOTAL	

CREATING ORGANIZATIONAL QUALITY	
43. The board discusses events and trends in the larger environment that may present specific opportunities for this organization.	
44. The board reviews the organization's mission at least once every three years.	
45. The board often discusses where the organization should be headed five or more years into the future.	
46. The board has a strategic vision and plan for the organization.	
47. The board sets clear organizational priorities for the year ahead.	
48. The board checks in regularly (at least every 6 months) on the implementation of the strategic plan.	
49. The board has evidence that the organization's services have assisted consumers in creating real change in their lives, consistent with the organization's mission.	
50. The board conducts an annual review of its own work and process.	
SUB – TOTAL	

YOUR TOTAL SCORE: _____

IF YOUR SCORE IS:

180 - 200: You're in fabulous shape! You have a highly functioning board with good working relationships. You should consider sharing some of your secrets with the rest of us!

160 - 179: Your board is in good shape. You have many strengths to build on. With a bit more work, you have real excellence at hand.

130 -159: You're on your way to a strong, effective board; pay attention to your weak spots, and involve the entire board in developing solutions.

100 - 129: You have lots of room for improvement. The board needs to prioritize areas to work on – both in the short and long term – make a plan, and work the plan!

Under 100: You're probably experiencing problems already. Now is the time to devote serious attention to ways to strengthen the structure, composition, and functioning of the board. If not, your programs, and ultimately the entire organization, will suffer.

Areas of Strength You Have Identified by Answering this Assessment:

1. _____
2. _____
3. _____
4. _____
5. _____

Areas For Possible Improvement You Have Identified by Answering this Assessment:

1. _____
2. _____
3. _____
4. _____
5. _____

If I Could Set the Priorities, I Would Suggest Taking Action on These Areas Now:

1. _____
2. _____
3. _____

Length of service with BOARD/organization: _____

(CHECK ONE) STAFF BOARD MEMBER

Adapted from *How Does Your Board Measure Up*, by Stephanie Roth (Grassroots Fundraising) and *Strategic Planning for Nonprofit Organizations: A Practical Guide and Workbook*, by Michael Allison and Jude Kaye (The Support Center for Nonprofit Management, 1997) and *Measuring Board Effectiveness: A Tool for Strengthening Your Board*, by Thomas P. Holland and Myra Blackmon (National Center for Nonprofit Boards, 2000).