

**Board Self-Assessment Questionnaire Tabulated Results**  
*Organization Name*

Section 1: Board & Staff Roles						
	Strongly Agree	Agree	Disagree	Strongly Disagree	Don't Know	Not Applicable
The roles and responsibilities of our board are clearly defined and separate from those of the staff.	4	8	1	0	0	0
Our board takes the primary responsibility for setting the organization's policies.	5	7	1	0	0	0
Board members seldom assume roles and responsibilities that belong to staff.	4	6	3	0	0	0
The board delegates to the organization's chief executive sufficient authority to lead the staff and carry out the organization's mission.	7	5	1	0	0	0
Board members do not interact with staff directly to influence staff behavior or program management without first coordinating with and getting the agreement of the chief executive officer.	4	4	5	0	0	0
When a problem or conflict arises between board and staff, we move quickly and effectively to resolve it.	2	5	6	0		0

Section 2: Policy Making Practices						
	Strongly Agree	Agree	Disagree	Strongly Disagree	Don't Know	Not Applicable
If a new policy is needed for the board or the organization as a whole, the issue is clearly presented to and discussed by the board.	4	8	1	0	0	0
The full board approves all new organizational policies before they are implemented.	5	7	1	0	0	0
Policies exist for key areas such as finance, human resources, safety, conflicts of interest, legal and ethical compliance, and any other functions unique to our organization's work.	4	6	3	0	0	0
Our organization's policies are effectively communicated to all board members.	7	5	1	0	0	0
The board reviews policies at least every two years, and updates them as needed.	4	2	2	5	0	0
The board revisits its role as the policy-making body of the organization at least every two years to ensure it is meeting this responsibility and has not drifted off-course into areas belonging to the staff.	2	5	1	5	0	0

**Board Self-Assessment Questionnaire Tabulated Results**  
*Organization Name*

<b>Section 3: Planning Practices</b>						
	Strongly Agree	Agree	Disagree	Strongly Disagree	Don't Know	Not Applicable
Our organization's mission and purpose are clearly understood and accepted by our board.	6	6	1	0	0	0
The mission and purpose of the organization are reviewed by the board each time strategic planning takes place to ensure that they are aligned with current program activities.	4	8	1	0	0	0
The members of the board reach consensus on a vision that communicates where the organization will be headed over the next 3-5 years.	2	8	1	2	0	0
The full board collaboratively reviews and updates the organization's strategic plan at least every two years.	0	2	6	5	0	0
Staff develop and carry out annual action plans based on the board-approved strategic plan.	5	8	0	0	0	0
The board is thoroughly briefed by the staff on annual plans developed by staff.	5	6	1	0	1	0

<b>Section 4: Fiscal Management Practices</b>						
	Strongly Agree	Agree	Disagree	Strongly Disagree	Don't Know	Not Applicable
The organization's annual budget is fully discussed and understood by the board prior to approving it.	2	4	6	1	0	0
The fiscal health of our organization is regularly reviewed and any necessary board actions are taken thoughtfully but quickly.	9	2	2	0	0	0
Board leadership takes steps to ensure that fiscal reports are thoroughly understood by all board members.	6	6	1	0	0	0
The annual report of our organization's independent auditor is reviewed by the board and any necessary actions are taken in a timely way.	8	4	0	0	1	0
Board members are fully aware of their legal responsibilities for the organization's fiscal management.	6	3	2	1	1	0
The board regularly reviews the financial investment practices and portfolio performance of the organization.	3	5	0	0	1	4

**Board Self-Assessment Questionnaire Tabulated Results**  
*Organization Name*

<b>Section 5: Fundraising Practices</b>						
	Strongly Agree	Agree	Disagree	Strongly Disagree	Don't Know	Not Applicable
Board members are updated regularly on our knowledge of new best practices in the field of philanthropy.	4	8	1	0	0	0
Our organization's fundraising needs and strategies are understood by the board.	5	7	1	0	0	0
The board has a clear policy on board members' responsibility to participate in fundraising efforts.	4	6	3	0	0	0
Board members play an active role in the organization's fundraising efforts.	7	5	1	0	0	0
The board periodically engages in long-range fiscal planning to ensure an adequate flow of financial resources to the organization overtime.	4	2	3	4	0	0
Capital fundraising needs are reviewed and included by the board as a part of the organization's strategic planning.	2	5	1	4	1	0

<b>Section 6: Board Structure and Practices</b>						
	Strongly Agree	Agree	Disagree	Strongly Disagree	Don't Know	Not Applicable
Our board's structure allows us to get our work done in a timely and effective way.	3	8	2	0	0	0
The board's ad hoc and standing committees streamline our work process and increase board effectiveness.	4	9	0	0	0	0
Our board's size is about right.	2	8	2	1	0	0
Our members' terms on the board are about the right length.	2	11	0	0	0	0
We consciously select and prepare board officers for their leadership responsibilities.	7	4	2	0	0	0
Board members have a working knowledge of the organization's by-laws.	1	6	3	0	3	0

**Board Self-Assessment Questionnaire Tabulated Results**  
*Organization Name*

Section 7: Board Committees						
	Strongly Agree	Agree	Disagree	Strongly Disagree	Don't Know	Not Applicable
The board updates the needs for ad hoc and standing committees and revises the structure as necessary at the beginning of each fiscal year.	0	7	4	0	2	0
Ad hoc and standing committee assignments generally reflect the interests and expertise of individual board members.	2	10	0	0	1	0
Standing and ad hoc committees complete their tasks in an effective and timely way.	0	13	0	0	0	0
Most board members actively participate in standing committee activities.	1	11	1	0	0	0
Standing and ad hoc committees report on their progress to the full board in a timely way, but at least quarterly.	2	11	0	0	0	0
Each standing committee establishes its goals and plans at the beginning of the fiscal year and then modifies them as needed.	1	4	4	0	4	0

Section 8: Board Meetings						
	Strongly Agree	Agree	Disagree	Strongly Disagree	Don't Know	Not Applicable
Our board's meetings schedule has the right number and length of meetings.	3	9	0	0	1	0
The agendas of our board meetings and supporting written material are provided in advance of meetings.	8	5	0	0	0	0
Board leaders and standing committee members contribute items to meeting agendas.	6	6	0	0	1	0
Board meetings are generally well-run and make good use of members' time.	7	5	1	0	0	0
Our board tends to brainstorm and identify creative approaches to problem-solving.	3	9	1	0	0	0
Our board thoroughly examines the pros and cons of all major issues and makes fully informed decisions.	3	10	0	0	0	0

**Board Self-Assessment Questionnaire Tabulated Results**  
*Organization Name*

<b>Section 9: Board Membership &amp; Orientation</b>						
	Strongly Agree	Agree	Disagree	Strongly Disagree	Don't Know	Not Applicable
The areas of expertise, skills, and other factors we need to be an effective board for this organization are adequately represented among current board members.	4	6	2	0	1	0
Our board successfully assesses the expertise, skills, and other contributions we need from potential new board members to maintain or increase our effectiveness.	1	9	0	1	2	0
We actively recruit new board members based on identified needs and not merely to fill a board vacancy.	2	7	3	1	0	0
When seeking members for the board, we use a wide variety of referral sources within the communities we serve.	1	8	3	1	0	0
Our board and staff inform new board members about responsibilities and important organizational information through a structured new member orientation program.	3	8	1	0	1	0
We annually assess the knowledge and skills needs of board members and address any identified gaps in an annual board development plan.	1	8	2	2	0	0

<b>Section 10: Board Executive Relationship</b>						
	Strongly Agree	Agree	Disagree	Strongly Disagree	Don't Know	Not Applicable
Our board uses a structured and participative process to recruit and hire our organization's chief executive.	3	4	3	2	0	1
The board has approved a written job description that clearly spells out the chief executive's responsibilities and authority.	1	8	2	0	2	0
The chief executive's performance is formally assessed at least annually based on objectives established at the beginning of the fiscal year.	8	5	0	0	0	0
The chief executive receives ongoing feedback regarding job performance in addition to any formal assessments.	4	4	3	2	0	0
Board members provide the necessary support that allows the chief executive to carry out the role successfully.	1	10	1	0	1	0
The board ensures that the chief executive has an ongoing professional development plan to enhance the executive's leadership effectiveness and ensures the availability of resources to implement the plan.	3	4	1	0	5	0

**Board Self-Assessment Questionnaire Tabulated Results**  
*Organization Name*

<b>Section 11: Monitoring &amp; Evaluation Practices</b>						
	Strongly Agree	Agree	Disagree	Strongly Disagree	Don't Know	Not Applicable
Board members are adequately knowledgeable about the organization's programs and services.	2	10	1	0	0	0
We periodically review with the chief executive the possibilities of adding new programs and services, and modifying or discontinuing current programs and services.	3	9	0	0	1	0
Our board keeps itself informed of our organization's performance against predetermined plans and goals.	1	12	0	0	0	0
The effectiveness of our board and committee structure is assessed at least every two years.	0	2	5	1	5	0
We annually assess our board members' satisfaction with their participation on the board.	1	4	3	5	0	0
We regularly evaluate the effectiveness of our board meetings.	1	2	6	2	2	0

<b>Section 12: External Relations Practices</b>						
	Strongly Agree	Agree	Disagree	Strongly Disagree	Don't Know	Not Applicable
Our board regularly assesses the effectiveness of our relations with our key external constituent groups.	0	9	2	0	2	0
Most of our individual board members are active either professionally or personally within the communities served by our organization.	6	7	0	0	0	0
The board has approved effective marketing and public relations strategies for the organization.	1	7	4	0	1	0
Individual board members actively support public relations and marketing events that benefit the organization during the fiscal year.	2	8	0	0	3	0
A majority of board members attends critical organizational events designed to promote the organization with key publics (annual meeting, annual programmatic kick-off event, openings of major new programs, etc.)	5	8	0	0	0	0
Board members are clear about who serves as official spokesperson for the organization.	6	6	0	0	1	0

## Strengths of the Board

### Identifying Strengths

To identify 8-15 areas in which the board seems to be performing well, review the tabulated list. The list is sorted according to the combined totals of "Strongly Agrees" and "Agrees" in descending order, with the highest total listed first. Secondly, it is sorted by the number of "Strongly Agrees" so that you can evaluate the strength of agreement. You may use this information to break ties between two items.

To qualify for this list of board strengths, all the items should have at least 65 percent of your board rating each item on the list as "Strongly Agree" or "Agree."

If you end up with several "ties," and there are more than 15 items on your list, explore breaking some of the ties by seeing which of the items had significantly more "Strongly Agrees" than "Agrees."

If, in the end, you have more than 15 items that have at least 65 percent of your board's vote, let all the items stand and prepare to brief your board on all of them.

Statement	Agree & Strongly Agree	Strongly Agree
The agendas of our board meetings and supporting written material are provided in advance of meetings.	100.00%	61.54%
The chief executive's performance is formally assessed at least annually based on objectives established at the beginning of the fiscal year.	100.00%	61.54%
Most of our individual board members are active either professionally or personally within the communities served by our organization.	100.00%	46.15%
Staff develop and carry out annual action plans based on the board-approved strategic plan.	100.00%	38.46%
A majority of board members attends critical organizational events designed to promote the organization with key publics (annual meeting, annual programmatic kick-off event, openings of major new programs, etc.)	100.00%	38.46%
The board's ad hoc and standing committees streamline our work process and increase board effectiveness.	100.00%	30.77%
Our board thoroughly examines the pros and cons of all major issues and makes fully informed decisions.	100.00%	23.08%
Our members' terms on the board are about the right length.	100.00%	15.38%
Standing and ad hoc committees report on their progress to the full board in a timely way, but at least quarterly.	100.00%	15.38%

Our board keeps itself informed of our organization's performance against predetermined plans and goals.	100.00%	7.69%
Standing and ad hoc committees complete their tasks in an effective and timely way.	100.00%	0.00%
The annual report of our organization's independent auditor is reviewed by the board and any necessary actions are taken in a timely way.	92.31%	61.54%
The board delegates to the organization's chief executive sufficient authority to lead the staff and carry out the organization's mission.	92.31%	53.85%
Our organization's policies are effectively communicated to all board members.	92.31%	53.85%
Board members play an active role in the organization's fundraising efforts.	92.31%	53.85%
Board meetings are generally well-run and make good use of members' time.	92.31%	53.85%
Our organization's mission and purpose are clearly understood and accepted by our board.	92.31%	46.15%
Board leadership takes steps to ensure that fiscal reports are thoroughly understood by all board members.	92.31%	46.15%
Board leaders and standing committee members contribute items to meeting agendas.	92.31%	46.15%
Board members are clear about who serves as official spokesperson for the organization.	92.31%	46.15%
Our board takes the primary responsibility for setting the organization's policies.	92.31%	38.46%
The full board approves all new organizational policies before they are implemented.	92.31%	38.46%
Our organization's fund raising needs and strategies are understood by the board.	92.31%	38.46%
The roles and responsibilities of our board are clearly defined and separate from those of the staff.	92.31%	30.77%
If a new policy is needed for the board or the organization as a whole, the issue is clearly presented to and discussed by the board.	92.31%	30.77%
The mission and purpose of the organization are reviewed by the board each time strategic planning takes place to ensure that they are aligned with current program activities.	92.31%	30.77%
Board members are updated regularly on our knowledge of new best practices in the field of philanthropy.	92.31%	30.77%
Our board's meetings schedule has the right number and length of meetings.	92.31%	23.08%
Our board tends to brainstorm and identify creative approaches to problem-solving.	92.31%	23.08%
We periodically review with the chief executive the possibilities of adding new programs and services, and modifying or discontinuing current programs and services.	92.31%	23.08%



Ad hoc and standing committee assignments generally reflect the interests and expertise of individual board members.	92.31%	15.38%
Board members are adequately knowledgeable about the organization's programs and services.	92.31%	15.38%
Most board members actively participate in standing committee activities.	92.31%	7.69%
The fiscal health of our organization is regularly reviewed and any necessary board actions are taken thoughtfully but quickly.	84.62%	69.23%
We consciously select and prepare board officers for their leadership responsibilities.	84.62%	53.85%
The board is thoroughly briefed by the staff on annual plans developed by staff.	84.62%	38.46%
Our board's structure allows us to get our work done in a timely and effective way.	84.62%	23.08%
Our board and staff inform new board members about responsibilities and important organizational information through a structured new member orientation program.	84.62%	23.08%
Board members provide the necessary support that allows the chief executive to carry out the role successfully.	84.62%	7.69%
Board members seldom assume roles and responsibilities that belong to staff.	76.92%	30.77%
Policies exist for key areas such as finance, human resources, safety, conflicts of interest, legal and ethical compliance, and any other functions unique to our organization's work.	76.92%	30.77%
The board has a clear policy on board members' responsibility to participate in fundraising efforts.	76.92%	30.77%
The areas of expertise, skills, and other factors we need to be an effective board for this organization are adequately represented among current board members.	76.92%	30.77%
The members of the board reach consensus on a vision that communicates where the organization will be headed over the next 3-5 years.	76.92%	15.38%
Our board's size is about right.	76.92%	15.38%
Individual board members actively support public relations and marketing events that benefit the organization during the fiscal year.	76.92%	15.38%
Our board successfully assesses the expertise, skills, and other contributions we need from potential new board members to maintain or increase our effectiveness.	76.92%	7.69%
Board members are fully aware of their legal responsibilities for the organization's fiscal management.	69.23%	46.15%

We actively recruit new board members based on identified needs and not merely to fill a board vacancy.	69.23%	15.38%
When seeking members for the board, we use a wide variety of referral sources within the communities we serve.	69.23%	7.69%
We annually assess the knowledge and skills needs of board members and address any identified gaps in an annual board development plan.	69.23%	7.69%
The board has approved a written job description that clearly spells out the chief executive's responsibilities and authority.	69.23%	7.69%
Our board regularly assesses the effectiveness of our relations with our key external constituent groups.	69.23%	0.00%

## Problem Areas Needing Attention

To identify those areas of the board's operations that seem to be problems review the tabulated list. The list is sorted according to the combined totals of "Strongly Disagrees" and "Disagrees" in descending order, with the highest total listed first. Secondly, it is sorted by the number of "Strongly Disagrees" so that you can evaluate the strength of agreement. You may use this information to break ties between two items.

One way for an item to qualify for this list of board areas that need strengthening, is that it should have at least 30 percent of your board rating each item on the list as "Strongly Disagree" or "Disagree."

If you end up with several "ties," and there are more than 10 items on your list, explore breaking some of ties by seeing which of the items had significantly more "Strongly Disagrees" than "Disagrees."

Note that the recommended process for analysis does not suggest that a majority of members needs to think an item is in need of improvement in order for it to make the list of 8-10. For example, if only five of a board of 16 members thinks an area needs work, those five members may be enough to warrant the item being on the list.

Statement	Disagree & Strongly Disagree	Strongly Disagree
The full board collaboratively reviews and updates the organization's strategic plan at least every two years.	84.62%	38.46%
We annually assess our board members' satisfaction with their participation on the board.	61.54%	38.46%
We regularly evaluate the effectiveness of our board meetings.	61.54%	15.38%
The board reviews policies at least every two years, and updates them as needed.	53.85%	38.46%
The board periodically engages in long-range fiscal planning to ensure an adequate flow of financial resources to the organization over time.	53.85%	30.77%
The organization's annual budget is fully discussed and understood by the board prior to approving it.	53.85%	7.69%
The board revisits its role as the policy-making body of the organization at least every two years to ensure it is meeting this responsibility and has not drifted off-course into areas belonging to the staff.	46.15%	38.46%
The effectiveness of our board and committee structure is assessed at least every two years.	46.15%	7.69%
When a problem or conflict arises between board and staff, we move quickly and effectively to resolve it.	46.15%	0.00%

## "Don't Know" Answers

If this list includes a significant number (30 percent or more) of board members responding "Don't Know" to an item, you may want to include those items in your list of 8-10 problem areas, depending on the item.

For example, it would not be a good sign if five members of a 16-person board indicated they did not know if the "organization's mission and purpose are clearly understood and accepted by the board." On the other hand, it may not be as important if the same number of members answered "Don't Know" to the statement, "Our board's size is just about right." In the first example, it is essential that all members know and support the organization's mission and purpose. The lack of agreement on such a core issue would likely have a negative impact on board operations. On the other hand, a difference of opinion on the size of the board is the kind of disagreement that can exist without it being detrimental to the work of the board.

Statement	Don't Know	%
The board ensures that the chief executive has an ongoing professional development plan to enhance the executive's leadership effectiveness and ensures the availability of resources to implement the plan.	5	38%
The effectiveness of our board and committee structure is assessed at least every two years.	5	38%
Each standing committee establishes its goals and plans at the beginning of the fiscal year and then modifies them as needed.	4	31%
Board members have a working knowledge of the organization's by-laws.	3	23%
Individual board members actively support public relations and marketing events that benefit the organization during the fiscal year.	3	23%
The board updates the needs for ad hoc and standing committees and revises the structure as necessary at the beginning of each fiscal year.	2	15%
Our board successfully assesses the expertise, skills, and other contributions we need from potential new board members to maintain or increase our effectiveness.	2	15%
The board has approved a written job description that clearly spells out the chief executive's responsibilities and authority.	2	15%
We regularly evaluate the effectiveness of our board meetings.	2	15%
Our board regularly assesses the effectiveness of our relations with our key external constituent groups.	2	15%
The board is thoroughly briefed by the staff on annual plans developed by staff.	1	8%

The annual report of our organization's independent auditor is reviewed by the board and any necessary actions are taken in a timely way.	1	8%
Board members are fully aware of their legal responsibilities for the organization's fiscal management.	1	8%
The board regularly reviews the financial investment practices and portfolio performance of the organization.	1	8%
Capital fundraising needs are reviewed and included by the board as a part of the organization's strategic planning.	1	8%
Ad hoc and standing committee assignments generally reflect the interests and expertise of individual board members.	1	8%
Our board's meetings schedule has the right number and length of meetings.	1	8%
Board leaders and standing committee members contribute items to meeting agendas.	1	8%
The areas of expertise, skills, and other factors we need to be an effective board for this organization are adequately represented among current board members.	1	8%
Our board and staff inform new board members about responsibilities and important organizational information through a structured new member orientation program.	1	8%
Board members provide the necessary support that allows the chief executive to carry out the role successfully.	1	8%
We periodically review with the chief executive the possibilities of adding new programs and services, and modifying or discontinuing current programs and services.	1	8%
The board has approved effective marketing and public relations strategies for the organization.	1	8%
Board members are clear about who serves as official spokesperson for the organization.	1	8%

## "N/A" Answers

The primary purpose of the "Not Applicable" response is to allow boards to differentiate themselves from other boards for specific reasons.

For example, an organization that has no paid staff and is essentially governed and operated by the board, would likely not find the items focusing on differentiating board and staff roles particularly valuable. It is possible that some members will think an item is not applicable to the organization and others will disagree. In such a case, the disagreement should be surfaced for discussion along with other problem areas. Simple clarification of viewpoints may resolve the matter, but it may also be that the disagreement signifies an important difference in the understanding of mission, role, or structure.

<b>Statement</b>	<b>Don't Know</b>	<b>%</b>
The board regularly reviews the financial investment practices and portfolio performance of the organization.	4	31%
Our board uses a structured and participative process to recruit and hire our organization's chief executive.	1	8%