

Sample Board Self-Assessment Report

Please feel free to use the following sample report to get a better understanding for the look and feel of the overall survey report. Note, this is just a sample and does not reflect the data for any particular organization. We suggest as you are looking to start your assessment process with BoardSource that you keep any timeline needs in mind. We will ask for 3-5 business days to create and send the final report once your survey is officially closed.



Questions? Reach out to assessments@boardsource.org.

Welcome

Dear Nonprofit Leader,

Congratulations on the completion of your BoardSource Board Self-Assessment. Enclosed you will find the results of your board's recent self-assessment. This report summarizes the responses to the survey, and should serve as a starting point for discussion and reflection about your board's core strengths, as well as areas that may need more attention.

The report is organized into four broad categories, which provide a framework for exploring the relationship between who serves on the board (The People), the culture it cultivates (The Culture), the way it fulfills its work responsibilities (The Work), and how all these efforts come together to position the organization to achieve your important mission (The Impact). The report also benchmarks your board's responses against other nonprofit organizations that have answered the same questions, which may be helpful as you consider your board's performance relative to your peers across the country.

As you review the report, we encourage you to consider the following:

- What stands out? Is there anything in the report that is especially surprising, or that you'd like to understand better through conversations as a full board?
- Does the board seem to be well aligned in terms of its assessment of its performance, or are there indications that different board members are experiencing the board's leadership performance differently? If the latter, why might that be?
- To what extent is your board meeting its own expectations? In what ways is the board happy with its leadership performance, and where is it signaling a desire to improve? Do any natural priorities emerge from the ratings?
- Based on what you see in the self-assessment, what are the top one to three areas where you think the board should focus its development efforts?

These questions may help your board unlock new insights about its leadership and help you determine what goals you want to set and prioritize for your own board development and growth. We encourage you to formalize those goals or priorities as an action plan to guide your board development efforts. BoardSource has a wide range of resources and tools that can support you in those efforts, some of which are highlighted throughout this report. We also encourage you to explore www.boardsource.org to learn more about other ways we can assist your board, whether through our consulting directory, educational programming, or research and leadership on issues of great importance to boards, the social sector, and our society as a whole.

Thank you for the important work that you do, and for trusting BoardSource to be your partner. We applaud you for making this investment in your board's leadership, and look forward to being a continued resource to you as you lead your organization's important mission and work.

Sincerely,



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Results Overview At-A-Glance

This report provides an overview of how well the board and the chief executive think the board is meeting its ten areas of governance responsibility as organized into the four broad categories. The scores for individual questions are averaged within each area of responsibility, and the scores for each responsibility are then averaged within each of the four overarching categories mentioned earlier: The People, The Culture, The Work, and The Impact. These board responsibilities and categories align with [Leading with Intent](#), BoardSource's national index of nonprofit board practices.

As you read through this report, we encourage you to familiarize yourself with [Leading with Intent](#), as well as with one of BoardSource's most popular books, [Navigating the Organizational Lifecycle: A Capacity-Building Guide for Nonprofit Board Leaders](#).

The scores below are based on a 5-point scale using the following definitions:

0 = Poor or needs improvement; 1 = Fair or marginal; 2 = OK or acceptable; 3 = Good or above average; 4 = Excellent or superior.

As an important note, respondents to the survey have the option to select NA/Don't Know to questions within the survey. Responses of NA/Don't Know are excluded from analysis within the final report and are not included in the averages provided. Responses of NA/Don't Know are also excluded from the total response count for that question.

Benchmarking Overview

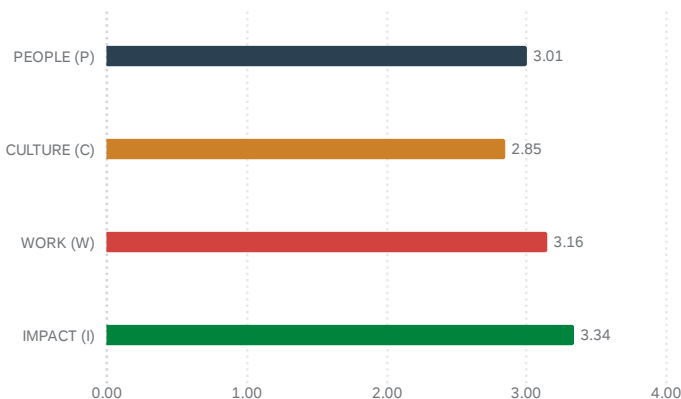
By comparing your performance as a governing body against that of your peers, you will be able to identify how your performance differs. Please use the benchmarking data as one point of reference within the context and history of your organization to help you focus on your strengths and consider potential areas for growth. It is important to note that our benchmarking offering does not necessarily reflect "best practices" that boards are recommended to follow, but rather is simply a jumping-off point, to be able to start a meaningful conversation with your board about where they stand on their work.

Our report benchmarks your data against other nonprofit organizations that have answered the same questions in BoardSource's Board Self-Assessment (BSA) surveys since 2013. It automatically updates in real time and as such is always changing. We revised our survey in 2018, therefore the audience size and makeup you are benchmarked against in this report may vary question by question. BoardSource endeavors to benchmark each question by the largest possible audience for maximum data integrity.

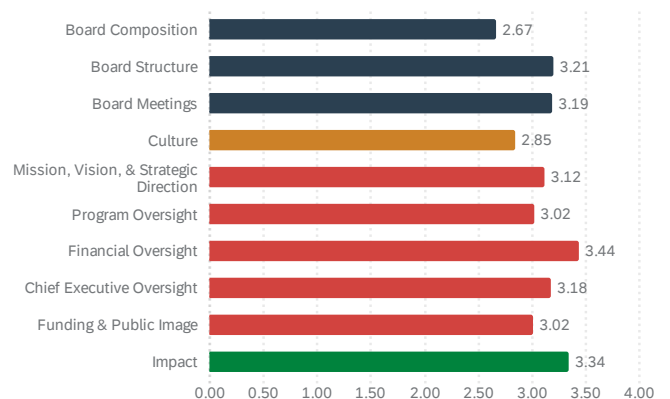
Results Overview

The graphs below show how your board has assessed its performance in the four categories (left) and ten responsibilities (right) of nonprofit boards.

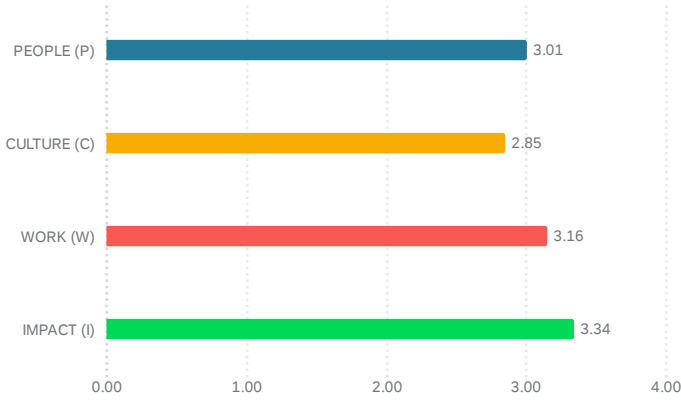
Your Board's Scores



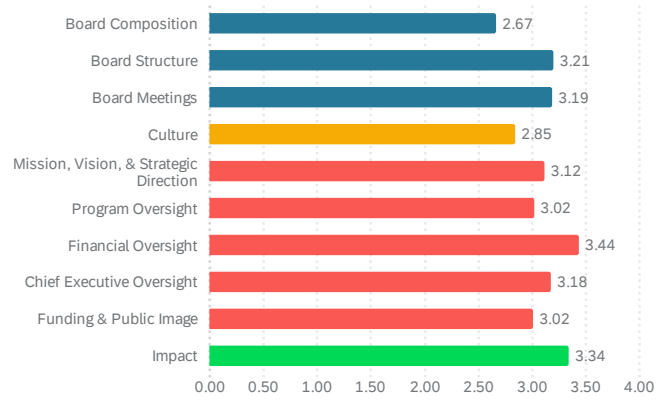
Your Board's Scores



All Boards Average Scores



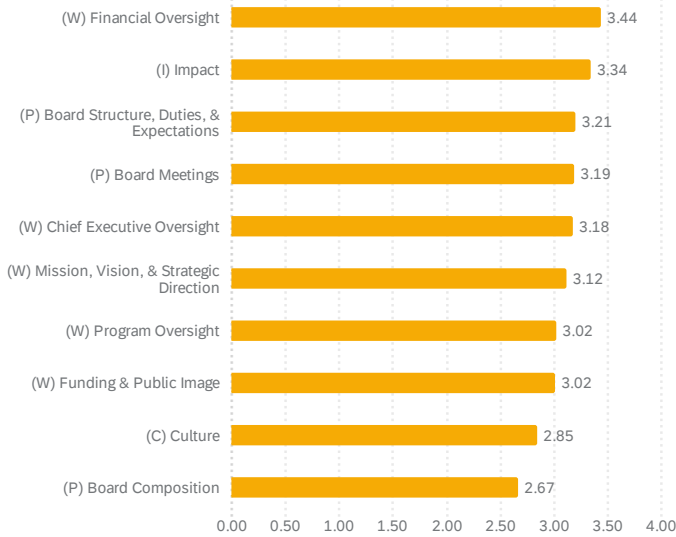
All Boards Average Scores



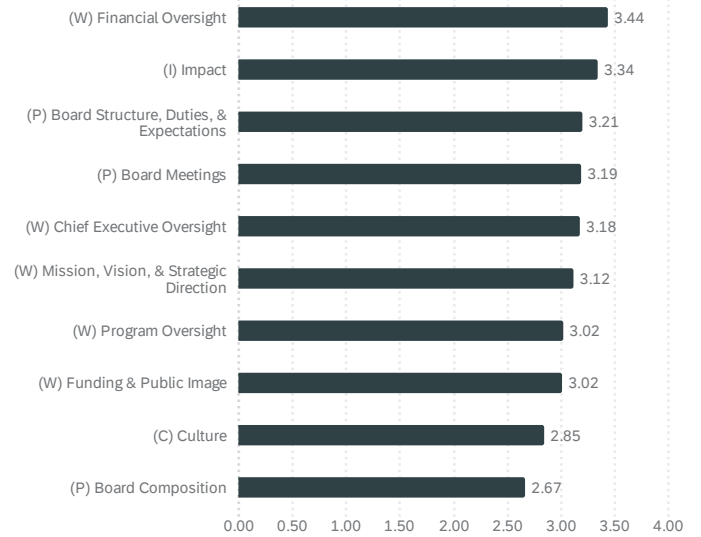
Highest to Lowest Ranked Responsibilities

The graph below shows how your board has assessed its performance — from highest to lowest — in the ten areas of responsibility. The board is performing well in those responsibilities that appear at the top of the graph. The board is performing acceptably in those responsibilities that fall in the middle of the graph, but it may want to monitor its performance. Those responsibilities that fall at the bottom of the graph may require board attention or merit further discussion.

Your Board



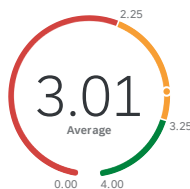
All Boards



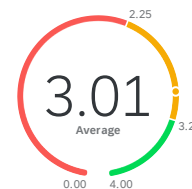
P | The People

Having the right people on the board makes higher performance — in both the board's internal and external functions — more likely. This section assesses the overall balance of who serves on the board (board composition), how people are organized (board structure), and how they deliberate together (board meetings).

People Score - Your Board



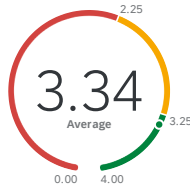
People Score - All Boards



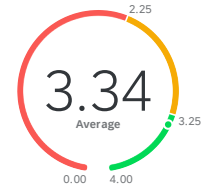
I | The Impact

This section explores the board's perception of its impact on organizational performance. The questions reflected here assess the board's connection to the organization's strategy, reputation, and overall effectiveness.

The Impact Score - Your Board



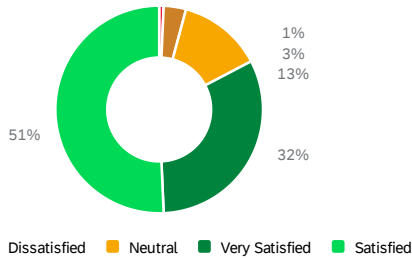
The Impact Score - All Boards



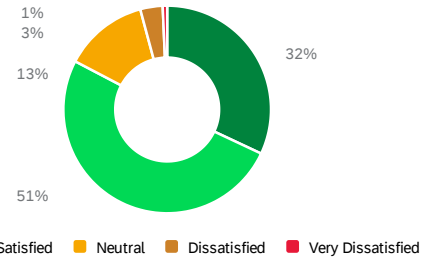
Overall Effectiveness as a Leadership Body

The following graphs reflect the board's thinking about its overall effectiveness. Because the percentages are based on the perceptions of your individual board members, this information can be used to spark a full board discussion on whether the members feel they are collectively meeting their responsibilities.

Your Board



All Boards

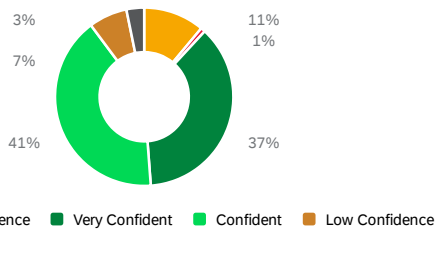


Leadership Resilience

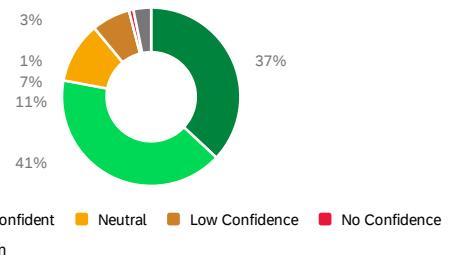
Hypothetically, if your chief executive were to suddenly leave his or her post, how confident are you that your board understands the organization well enough to make informed decisions about how the organization should be led (not just in terms of who the leader should be, but what the new leader will confront)?

This is a hypothetical question that seeks to understand leadership resilience; it is not intended to serve any other purpose. As such, the scores from this question are not factored into your board's overall IMPACT score.

Your Board



All Boards



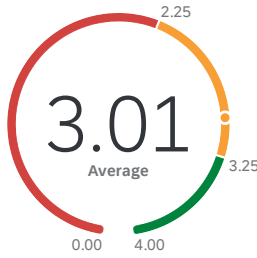
Board Service Experience

P | The PEOPLE

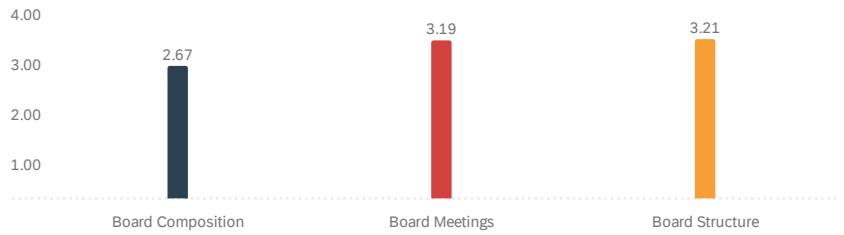
Includes:
 Board Composition
 Board Structure
 Board Meetings

Having the right people on the board makes higher performance — in both the board’s internal and external functions — more likely. The most successful boards are thoughtfully composed as it relates to skillsets, leadership styles, and diversity of thought and background. This section of the report explores who serves on your board, how it is organized as a collective body, and how it structures and conducts its board meetings.

Your People Score



Your role score is based on the following responsibility scores:



Board Composition | Section Detail

People are the lifeblood of any organization, and — for a nonprofit organization — that includes the board of directors, which is responsible for its own composition and leadership. A good board is composed of individuals who contribute critically needed skills, experience, perspective, wisdom, contacts, time, and other resources to the organization. A well-conceived board-building plan helps the board to identify, recruit members and cultivate officers. New members are oriented to contribute and understand the board’s responsibilities and the organization’s core activities. Board member rotation ensures that the board is infused with new ideas yet remains a manageable size.

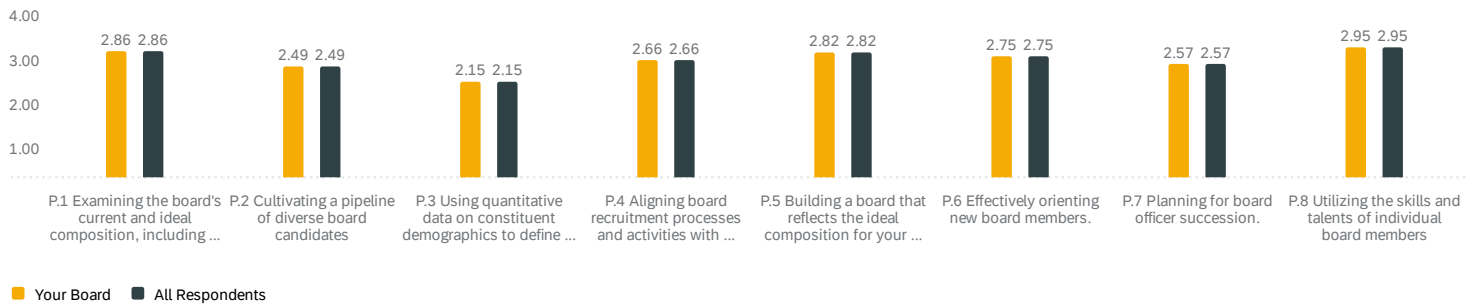
Strengthen Performance through Action

1. Approach recruitment and board building as an ongoing and strategic cycle.
2. If necessary, enhance the profile of your organization to make it attractive to strong board candidates.
3. Create a solid orientation program for new members no matter the extent of their previous board experience.
4. If you have one, ensure your governance committee is fully engaged and involves every board member in the board-building process by recommending or cultivating potential new board members.

Recommended Resources - Board Composition

- Book: [The Board Building Cycle](#)
- Free Community Resource: [Taking Action on Board Diversity: Five Questions to Get You Started](#)
- Member Resource: [Recruiting the Right Board Members](#)

Average Score

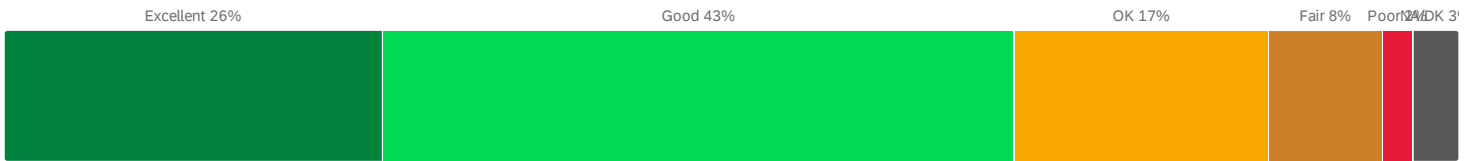


Question Breakdowns

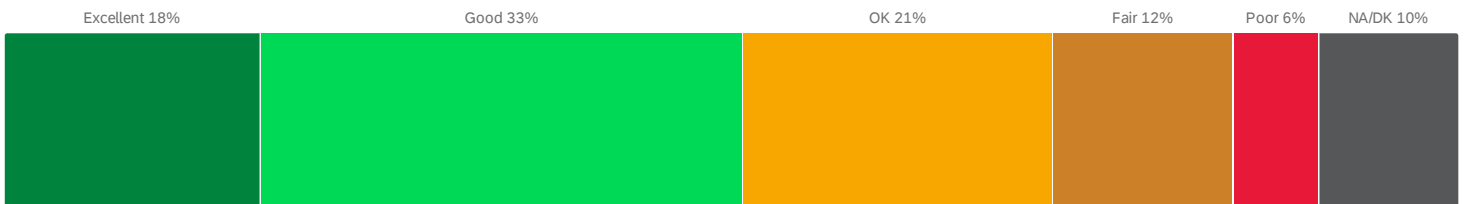
(Please rate the board's performance in the following:)

■ Excellent ■ Good ■ Ok ■ Fair ■ Poor ■ NA / Don't Know

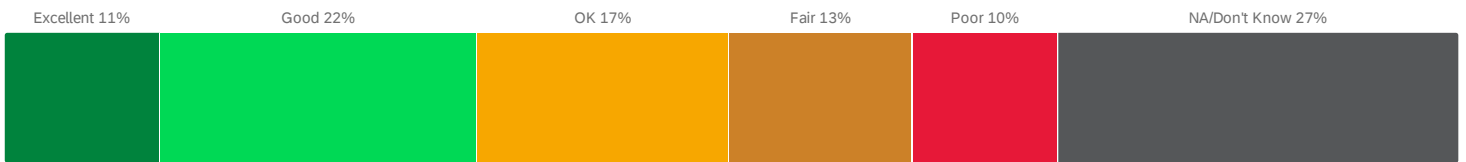
P.1 Examining the board's current and ideal composition, including demographic diversity, to ensure that the board has the perspective it needs.



P.2 Cultivating a pipeline of diverse board candidates.



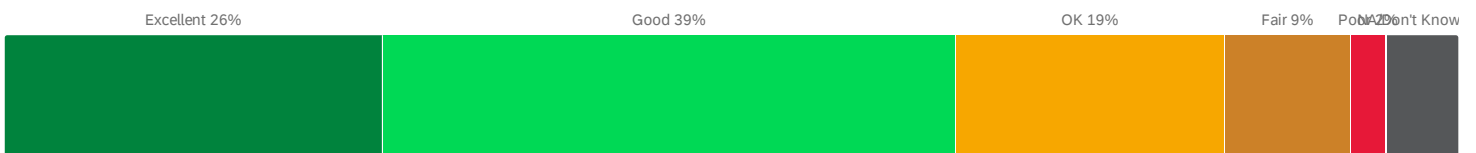
P.3 Using quantitative data on constituent demographics to define what the ideal board composition looks like, including projections on anticipated changes.



P.4 Aligning board recruitment processes and activities with stated goals for board composition.



P.5 Building a board that reflects the ideal composition for your organization's mission and work.



Board Structure, Duties, and Expectations | Section Detail

The board is responsible for making sure its own practices are appropriate and up-to-date. Every board needs structure — rules, guidelines, and boundaries — and should operate in accordance with the structure provided by the organization’s bylaws, policies, and procedures. It is also important for the board to periodically review and revise the bylaws, policies, and procedures as necessary. Finally, the board should be strategic about its use of committees and task forces, ensuring that each has a written charter and capable leadership.

Size Matters

The primary guide for determining board size is the board’s function, which may change over time depending on organizational lifecycle, board responsibilities, committee structure, legal mandates, need for diversity, and maintaining a manageable group. Variables such as these make it impossible to recommend a standard size for all boards; however it is difficult to imagine that a board with fewer than five members is able to incorporate all the desired qualities and capacity of an effective board, or that an exceptionally large board is able to engage every member in a constructive manner. Regardless of size, all board members must be engaged, as all are equally accountable for the organization.

Committees

Committees can be a practical way to structure and manage the board’s work. Standing committee structure can be lean, strategic, and complemented by the use of task forces. Only ongoing board activities really need a standing committee. Otherwise, time-limited task forces are efficient and utilize board members’ time, interest, and expertise in a meaningful manner. Committees and task forces are more effective when their charter and scope of work are clearly defined by the board.

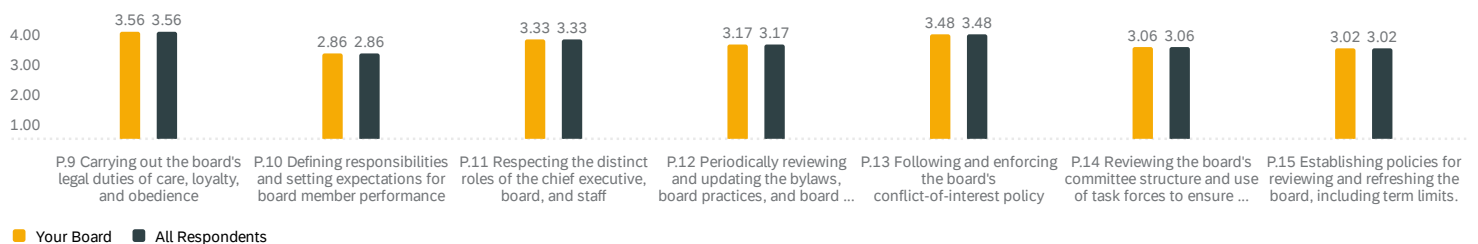
Strengthen Performance through Action

1. Periodically assess your board’s workload, committee structure, lifecycle requirements, need for diversity, and legal mandates to ensure that your board is managed well.
2. View your bylaws and policies as evolving documents needing regular review; ensure timely amendments when necessary.
3. Consider using time-limited task forces in lieu of standing committees for those activities that are not ongoing.

Recommended Resources - Board Structure

- Free Community Resource: [Board Committee Membership: Who Should Serve on Which Committee?](#)
- Member Resource: [Board Development Plan](#)
- Free Community Resource: [Bylaws Dos and Don'ts](#)

Average Score



Question Breakdowns

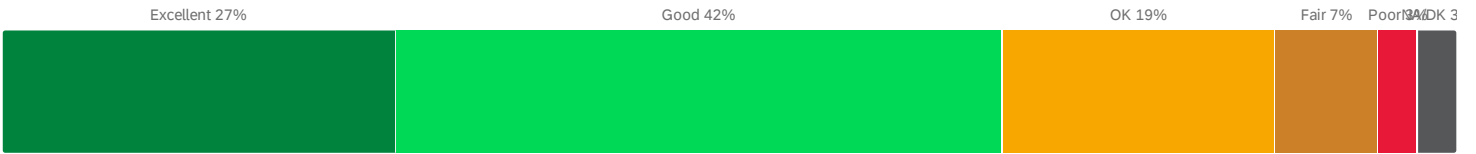
(Please rate the board's performance in the following:)

■ Excellent
 ■ Good
 ■ Ok
 ■ Fair
 ■ Poor
 ■ NA / Don't Know

P.9 Carrying out the board's legal duties of care, loyalty, and obedience.



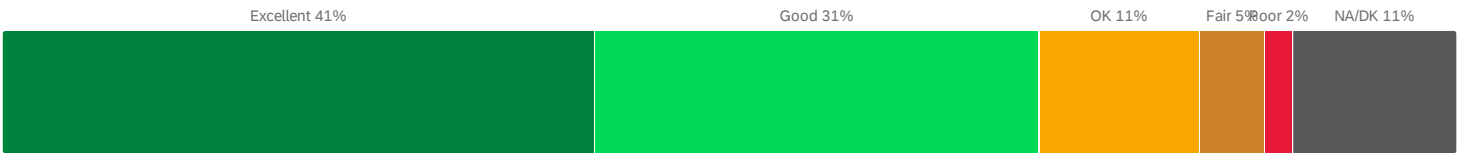
P.10 Defining responsibilities and setting expectations for board member performance.



P.11 Respecting the distinct roles of the chief executive, board, and staff.



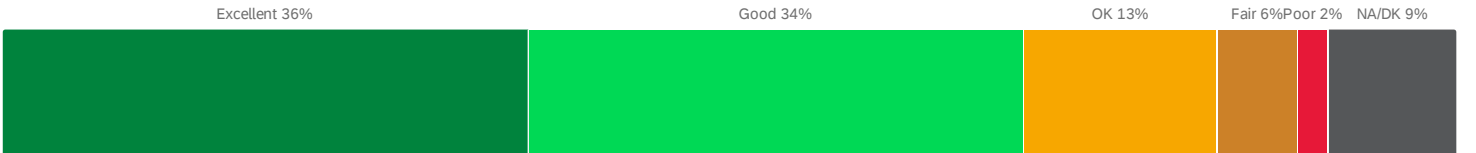
P.12 Periodically reviewing and updating the bylaws, board policies, and board procedures.



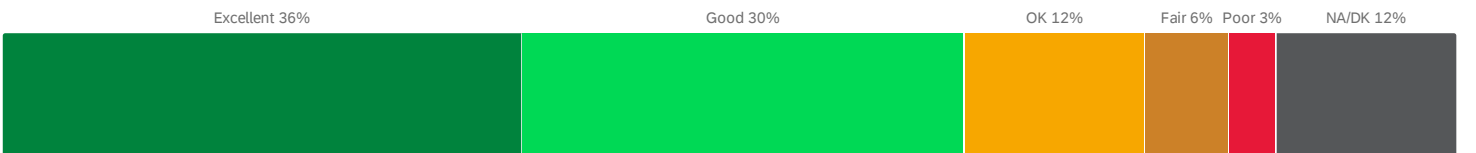
P.13 Following and enforcing the board's conflict-of-interest policy.



P.14 Reviewing the board's committee structure and use of task forces to ensure they effectively support the work of the board.



P.15 Establishing policies for reviewing and refreshing the board, including term limits.



Board Meetings | Section Detail

Meetings are when boards exercise their governance authority. Because board meeting time is a precious and limited resource, board members must make board meeting attendance a priority and structure their meetings in an efficient and effective manner. Without concerted efforts, it is easy to waste time and resources, dampen members' enthusiasm and interest, and meet without demonstrable results. Board members who prepare for and attend meeting are able to participate in educated and independent decision-making.

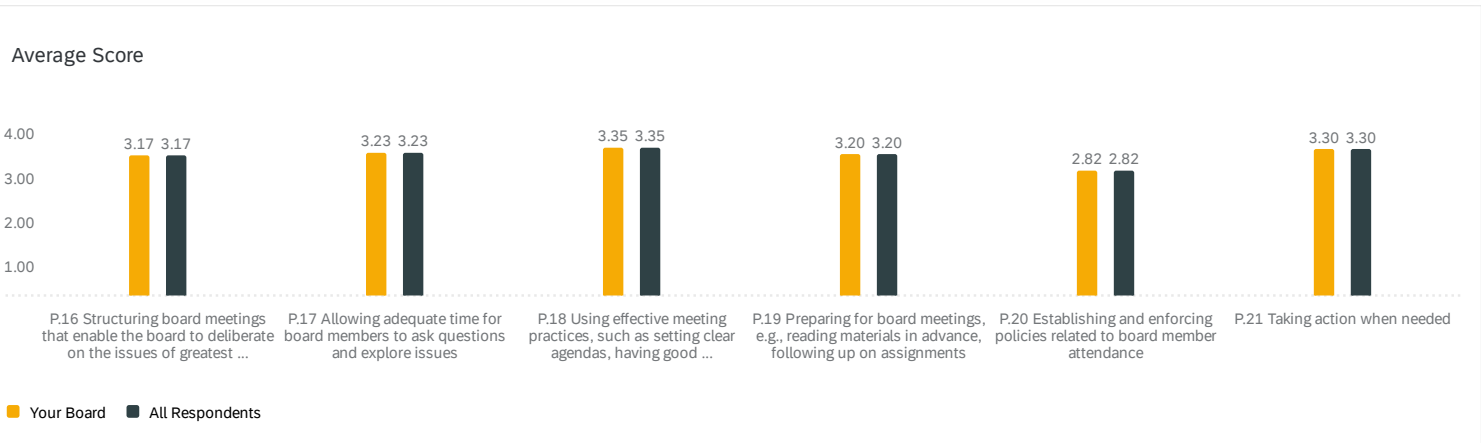
Meetings need to be managed. A well-designed agenda helps the board chair guide the discussion and keep all members focused on the work at hand. Board members lose interest if they are not challenged and able to utilize their special skills. Listening to repetitive reports is not a constructive use of limited meeting time. Make sure that the majority of your board's meeting time is spent on future issues. By planning ahead and focusing on activities before, during, and after the meeting, you move closer to efficient meeting procedures and outcomes that meet the expectations.

Strengthen Performance through Action

1. Shape your board meetings in such a way that they invite board engagement.
2. Approach meetings as a vital resource in service to the organization's sustainability and plan accordingly.
3. Make sure the agenda ties in with the strategic plan. Focus on your big issues.
4. Board members: Read the materials sent to you in advance of the meeting. Come to the meeting prepared. Be ready to participate.

Recommended Resources - Board Meetings

- Free Community Resource: [Board Meeting Preparation:10 Tips for Chief Executives and Board Chairs](#)
- Member Resource: [Facilitating an Engaged Board](#)



Question Breakdowns

(Please rate the board's performance in the following:)

■ Excellent
 ■ Good
 ■ Ok
 ■ Fair
 ■ Poor
 ■ NA / Don't Know

P.16 Structuring board meetings that enable the board to deliberate on the issues of greatest organizational importance.



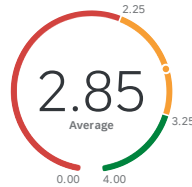
P.17 Allowing adequate time for board members to ask questions and explore issues.



C | The CULTURE

How the board conducts its work — from group dynamics to its relationship with the chief executive — can help or hinder the board’s ability to carry out its work. Likewise, board culture and dynamics are also affected by who serves on the board and the nature of the work that the board undertakes.

Your Culture Score



Culture | Section Detail

How board members communicate with each other, work as a team, and make decisions all define the culture of the board. The combination of formal and informal rules, traditions, and agreements that develop over time inform how a board interacts, deliberates, and ultimately performs as a governing body.

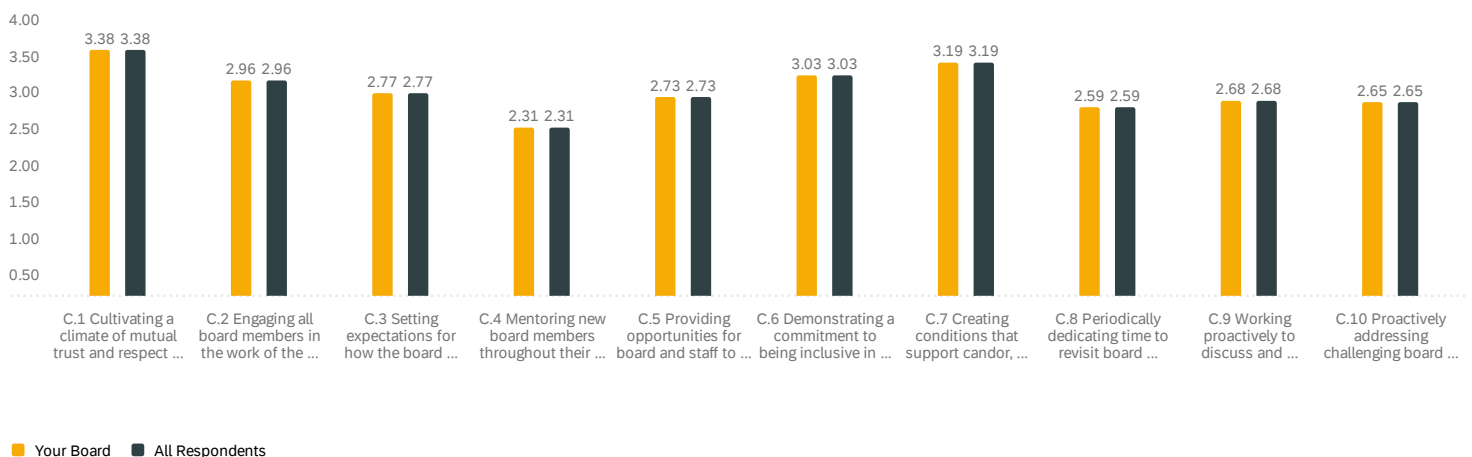
Strengthen Performance Through Action

- Consider board culture as a key factor in board performance.
- Envision, as a team, what an ideal board culture would look like.
- Reflect on what investments have been made to date toward a healthy board culture.

Recommended Resources - Board Culture

- Free Community Resource: [Catalytic Questions](#)
- Member Resource: [18 Questions About Board Culture](#)
- Member Resource: [Eight Ways to Increase Your Board's Ability to Work as a Team](#)

Average Score



Question Breakdowns

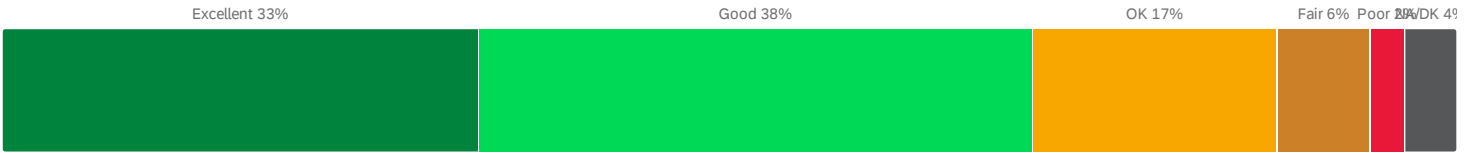
(Please rate the board's performance in the following:)

■ Excellent ■ Good ■ Ok ■ Fair ■ Poor ■ NA / Don't Know

C.1 Cultivating a climate of mutual trust and respect between board members.



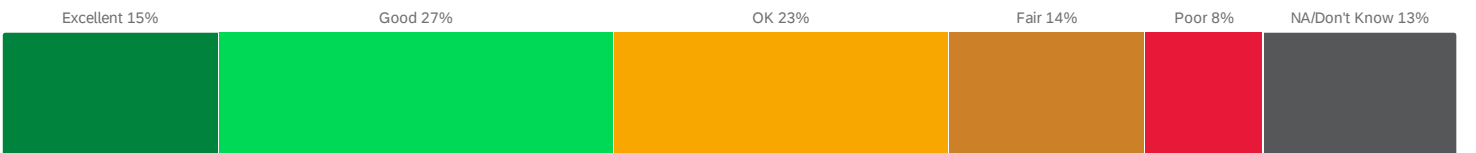
C.2 Engaging all board members in the work of the board.



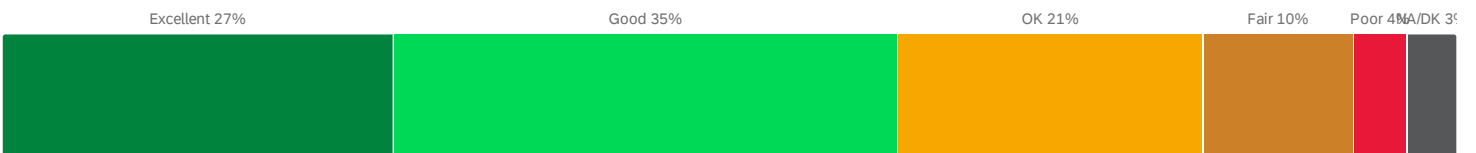
C.3 Setting expectations for how the board works together as a part of board orientation.



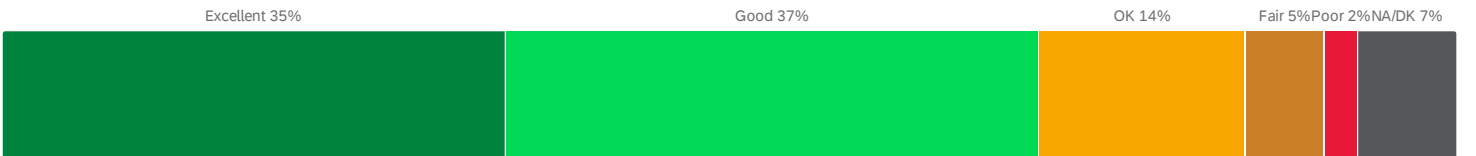
C.4 Mentoring new board members throughout their first year on the board.



C.5 Providing opportunities for board and staff to get to know each other.



C.6 Demonstrating a commitment to being inclusive in processes, decision making, and officer/committee chair selection.



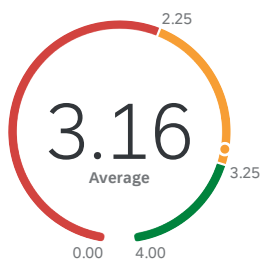
W | The WORK

Includes:

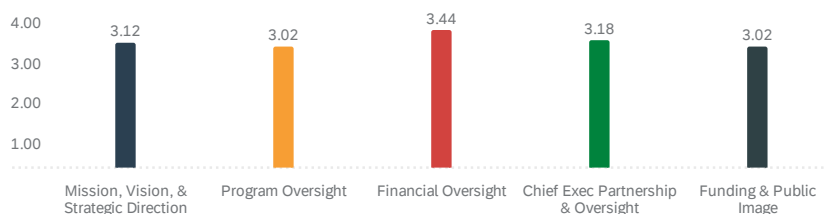
Mission, Vision, and Strategic Direction
Program Oversight
Financial Oversight
Chief Executive Partnership and Oversight
Funding and Public Image

Boards are charged with important responsibilities. Some of these responsibilities are more fundamental, such as understanding the organization's mission and providing financial oversight. Other responsibilities are more strategic and adaptive — such as providing strategic direction and partnership with the chief executive — and still others address external leadership and ambassadorship. This section explores how well the board understands its responsibilities in each of these areas.

Your Work Score



Your role score is based on the following responsibility scores:



Mission, Vision, and Strategic Direction | Section Detail

One of the board's primary roles is to set strategic direction. Key elements to consider when setting direction are your organization's mission, vision, and values.

- A mission statement defines your organization's fundamental purpose. A clear mission statement is inspirational yet realistic, emotional as well as informative, concise and complete. It is positive and focuses on achievable accomplishments.
- The vision statement is about long-term goals and the direction in which the organization is heading. It defines the organization's dream. Because a vision statement is created through a group process in which all board members share their ideals for the organization, it has a team-building effect.
- Values are the principles that help mold the organization's character, tone, and working style. By articulating these principles, the board establishes guideposts that help chart direction for years ahead.

A good statement of mission and purposes serves to guide organizational planning and setting priorities among competing demands for scarce resources. To further carry out its role in setting direction, the board is actively involved in strategic planning and thinking. To do this effectively, the board must understand the organization's clients and stakeholders, as well as its internal and external operating environments. This enables the board to respond appropriately as opportunities and challenges arise. The board should focus its efforts primarily on long-term, strategic issues, rather than short-term operational and administrative matters.

Effective and strategic boards take responsibility for identifying the issues that must be addressed to serve the organization's mission, vision, and values in the years ahead. Board members should utilize their unique talents and experience to identify these issues and to inform the organization's understanding of them.

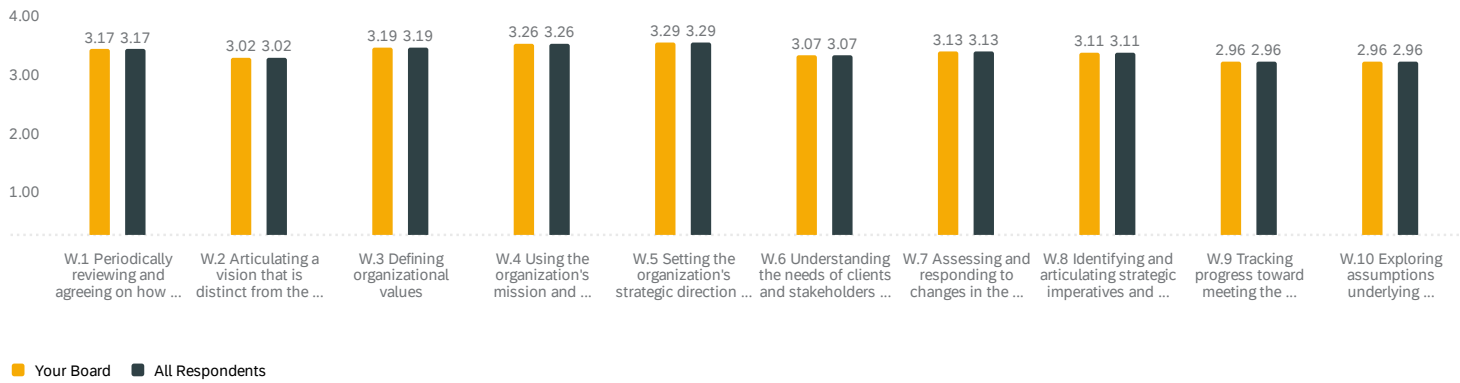
Strengthen Performance through Action

1. Occasionally revisit the organization's mission and vision statements to ensure that the organization remains relevant.
2. Work together with the chief executive to provide guidance and input in developing the strategic planning process.
3. Elevate strategic thinking by incorporating it into every board meeting rather than relegating it to annual retreats or strategic planning processes.

Recommended Resources - Mission, Vision, and Strategic Direction

- Book: [The Nonprofit Board's Role in Mission, Planning, and Evaluation](#)
- Free Community Resource: [Tips for Developing a Mission Statement](#)
- Free Community Resource: [Mission Statement vs. Vision Statement](#)
- Guide: [Shaping the Future of Your Organization: A Strategic Planning Guide for Nonprofit Leaders](#)
- Free Community Resource: [Nonprofit Strategy By the Numbers: Evolution and Progress](#)
- Free Community Resource: [Charting a New Path Forward: Insights & Reflections from BoardSource's Strategic Planning Efforts](#)

Average Score



Question Breakdowns

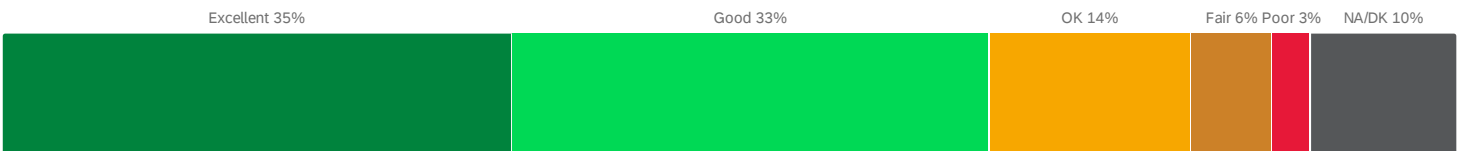
(Please rate the board's performance in the following:)



W.1 Periodically reviewing and agreeing on how the organization should fulfill its mission.



W.2 Articulating a vision that is distinct from the mission.



W.3 Defining organizational values.



W.4 Using the organization's mission and values to drive decisions.



Program Oversight | Section Detail

The board is responsible for program oversight and should work in collaboration with staff to understand the scope of the organization's programs and services, establish appropriate goals for quality and results, and monitor performance data. To strengthen the board's program oversight, board members should be provided with opportunities to connect with and deepen their understanding of the organization's mission and work.

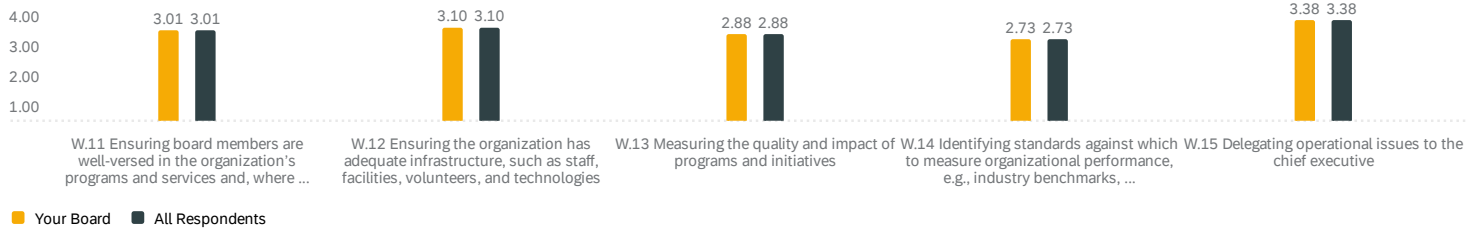
Strengthen Program Oversight through Action

1. Embrace board education around programs and services as an ongoing activity.
2. Devote time to discussions of what kinds of program data are board — rather than management — related.
3. Determine how to provide the board with the information it needs to make data-driven and informed decisions while avoiding report overload at board meetings.

Recommended Resources - Program Oversight

- Book: [The Nonprofit Dashboard: Using Metrics to Drive Mission Success](#)
- Free Community Resource: [Strengthen Your Board's Leadership by Increasing Its Understanding of Programs](#)
- Member Resource: [Identifying and Managing Risk](#)
- Member Resource: [Nonprofit Programmatic Oversight Tool](#)

Average Score

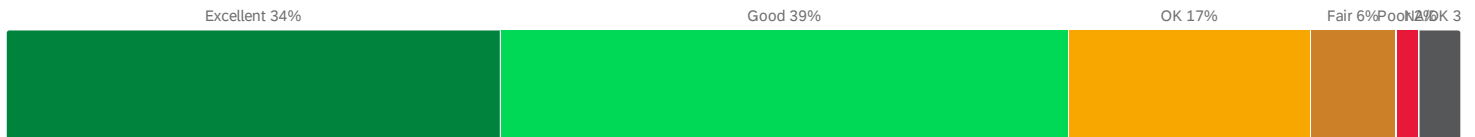


Question Breakdowns

(Please rate the board's performance in the following:)

■ Excellent
 ■ Good
 ■ Ok
 ■ Fair
 ■ Poor
 ■ NA / Don't Know

W.11 Ensuring board members are well-versed in the organization's programs and services and, where appropriate, have an opportunity to experience the programs.



W.12 Ensuring the organization has adequate infrastructure, such as staff, facilities, volunteers, and technologies.



W | The WORK (Continued)

Financial Oversight | Section Detail

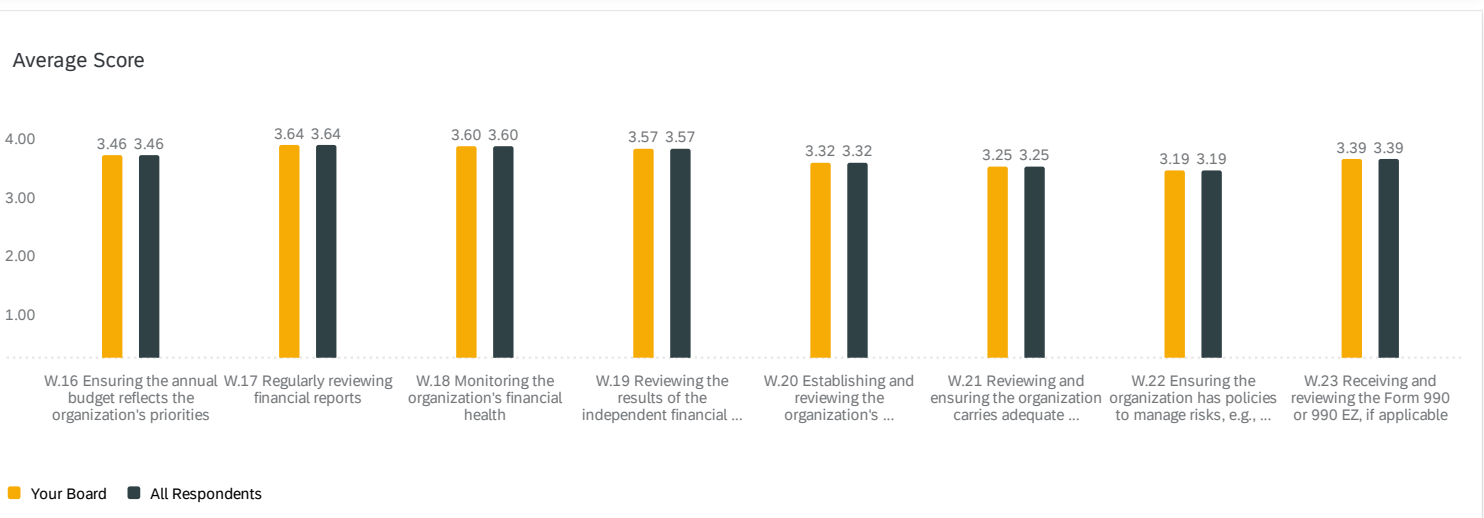
Boards are responsible for ensuring the organization has adequate resources, protecting its assets, and maintaining its legal and ethical integrity. This includes approving the annual budget and then monitoring performance against the budget throughout the year. The board also oversees the annual audit to verify that the organization is accurately reporting the sources and uses of its funds. To safeguard the organization's future, the board establishes appropriate investment and risk management policies, as needed.

Strengthen Financial Oversight through Action

1. Assist all board members in understanding nonprofit financial statements through onboarding activities and ongoing education.
2. Cultivate a climate of partnership, transparency, and rigorous ethics among board finance committee members and finance staff.
3. Encourage a culture of inquiry on the full board, recognizing that finance committee recommendations are simply that and liability for decisions rests with the full board.

Recommended Resources - Financial Oversight

- Free Community Resource: [Red Flags, Yellow Flags: Are Your Financial Statements Trying to Tell You Something?](#)
- Book: [Financial Responsibilities of Nonprofit Boards](#)
- Guide: [Welcome to Your Financial Statements: A Primer for Nonprofit Board Members](#)



Question Breakdowns

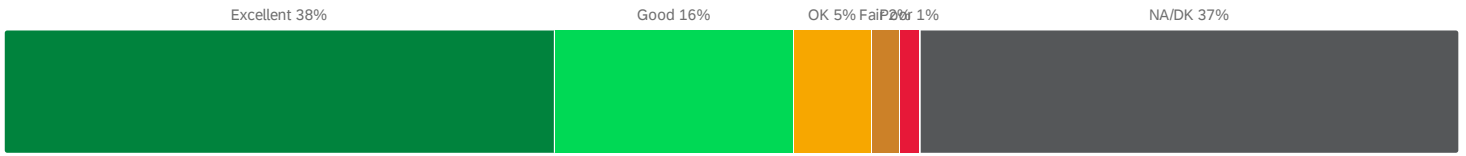
(Please rate the board's performance in the following:)

■ Excellent
 ■ Good
 ■ Ok
 ■ Fair
 ■ Poor
 ■ NA / Don't Know

W.16 Ensuring the annual budget reflects the organization's priorities.

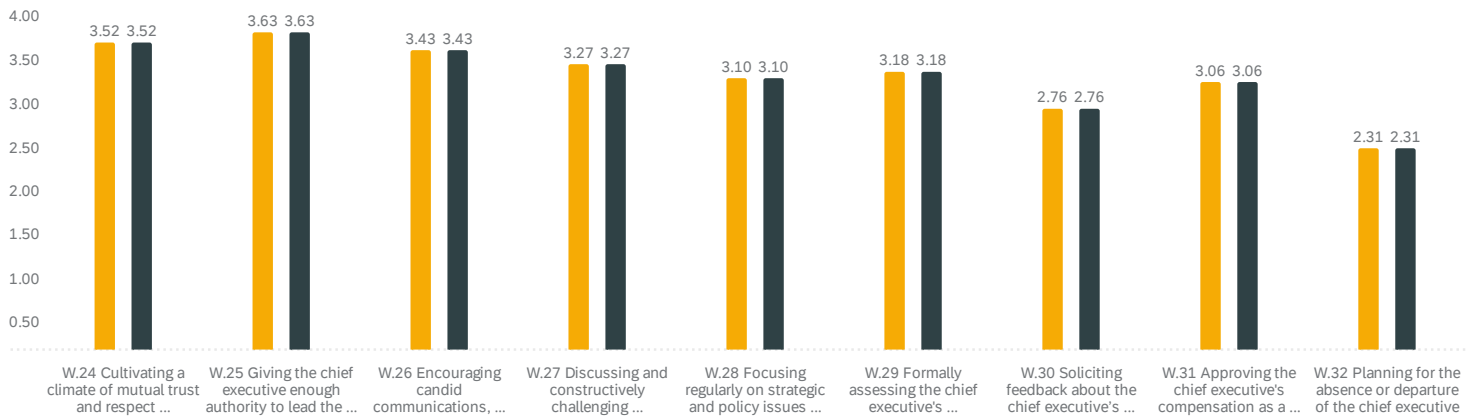


W.23 Receiving and reviewing the Form 990 or 990 EZ, if applicable.



Would you like to provide any comments or context to your ratings for this section?

Average Score



■ Your Board ■ All Respondents

Question Breakdowns

(Please rate the board's performance in the following:)

■ Excellent
 ■ Good
 ■ Ok
 ■ Fair
 ■ Poor
 ■ NA / Don't Know

W.24 Cultivating a climate of mutual trust and respect between the board and chief executive.



W.25 Giving the chief executive enough authority to lead the staff and manage the organization.



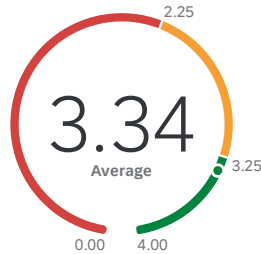
W.26 Encouraging candid communications, including the sharing of challenges and issues in a timely manner.



I | The IMPACT

This section explores the board's perception of its impact on organizational performance. The questions reflected here assess the board's connection to the organization's strategy, reputation, and overall effectiveness and the extent to whether this is a positive or negative impact.

Your Impact Score



Impact | Section Detail

If the board has a negative or neutral impact on organizational performance, there's an opportunity to make improvements and better utilize the board's time and leadership as a vital resource. [Leading with Intent](#) data suggest two characteristics that both chief executives and board chairs report as having the strongest connection to board impact: understanding the board's role and responsibilities and the board's ability to work as a collaborative team.

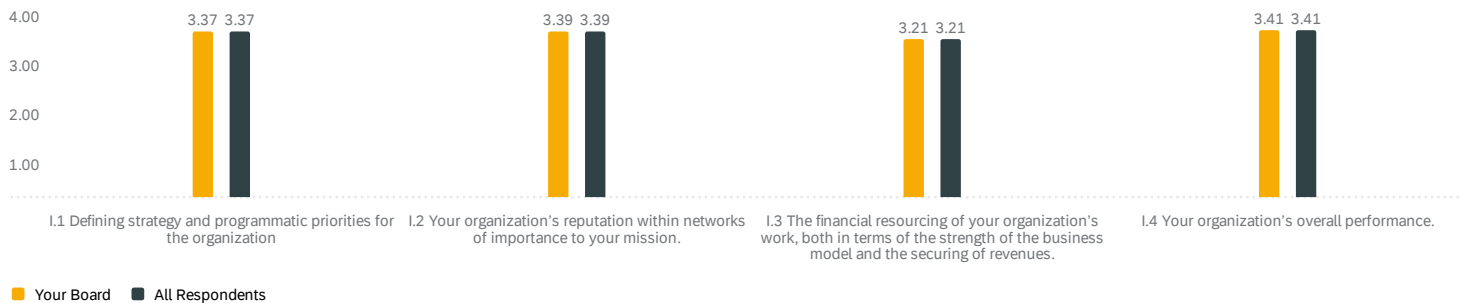
Strengthen Board Impact through Action

1. Discuss the board's results for this section, including what information or practices would better help the board in making a positive impact.
2. Evaluate the impact results in light of your board's results in other sections of this report, looking for any potential relationships in high or low scoring areas.

Recommended Resources - Board Impact

- Book: [The Source: 12 Principles of Governance That Power Exceptional Boards](#)
- Free Community Resource: [What Makes a Good Board Member?](#)
- Member Resource: [Eight Ways to Increase Your Board's Ability to Work as a Team](#)

Average Score



Question Breakdowns

(What impact does your board have on the following:)



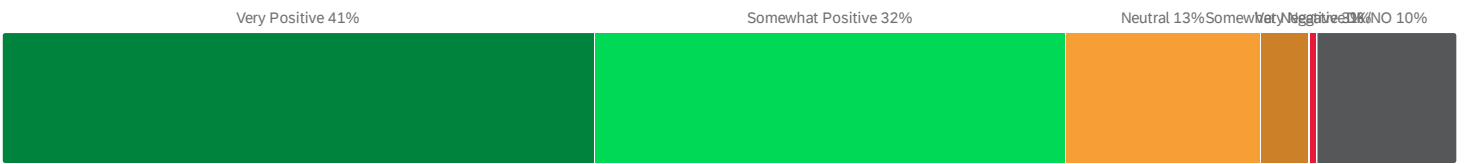
I.1 Defining strategy and programmatic priorities for the organization. (We asked that you assess both the quality/substance of the board's input and the clarity with which the board has defined these strategies and priorities.)



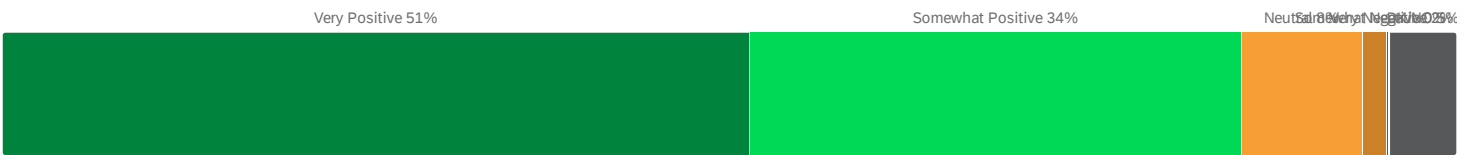
I.2 Your organization's reputation within networks of importance to your mission. (We asked that you focus specifically on the extent to which the board enhances the organization's reputation [by communicating the organization's values and priorities], rather than filtering it through the lens of fundraising or anything else.)



I.3 The financial resourcing of your organization's work, both in terms of the strength of the business model and the securing of revenues.



I.4 Your organization's overall performance.



Would you like to provide any comments or context to your ratings for this section?

Checklist of Practices

Certain policies and practices characterize an effective nonprofit board. Some of these practices are required by law; many others have become widely accepted as good practice. The board self-assessment survey asked yes/no questions about these practices, which were answered only by the chief executive.

The gauges below show the percent of practices your board currently has in place.

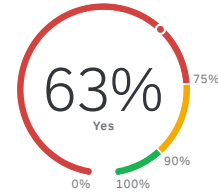
These practices are divided into four areas:

1. **Organizational Practices** cover documents and procedures related to mission, strategy, and accountability.
2. **Oversight Practices** include policies and procedures related to financial oversight and compliance.
3. **Board Practices** address issues related to board orientation, term limits, retreats, and committees.
4. **Chief Executive Supervision Practices** cover the support and supervision of the highest paid staff person.

Organizational Practices

Does your board have the following practices in place?

% of organizational practices your board has in place:



CLP.1 Written mission statement?

Yes

CLP.2 Written vision statement?

Yes

CLP.3 Written code of ethics?

Yes

CLP.4 Clearly defined and documented approach to organizational strategy?

Yes

CLP.5 Has the organization completed the board leadership practices section of its GuideStar profile?

No

CLP.6 Has the organization completed the board and staff demographics section of its GuideStar profile?

No

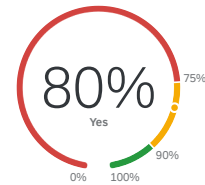
Benchmark: % of boards that have each policy in place: 7

Board Practices	Yes
CLP.01 Written mission statement	99%
CLP.02 Written vision statement	84%
CLP.03 Written code of ethics	71%
CLP.04 Clearly defined and documented approach to organizational strategy	66%
CLP.05 Has the organization completed the board leadership practices section of its GuideStar profil	27%
CLP.06 Has the organization completed the board and staff demographics section of its GuideStar prof	27%

Oversight Practices

Does your board have the following practices in place?

% of oversight practices your board has in place



CLP.7 Did the full board formally approve the organization's annual budget?

Yes

CLP.8 Does the full board receive financial reports at least quarterly?

Yes

CLP.9 Within the past year, has the organization obtained a formal independent audit?

Yes

CLP.10 Did the board, or a committee of the board, meet with the auditors without staff present?

Yes

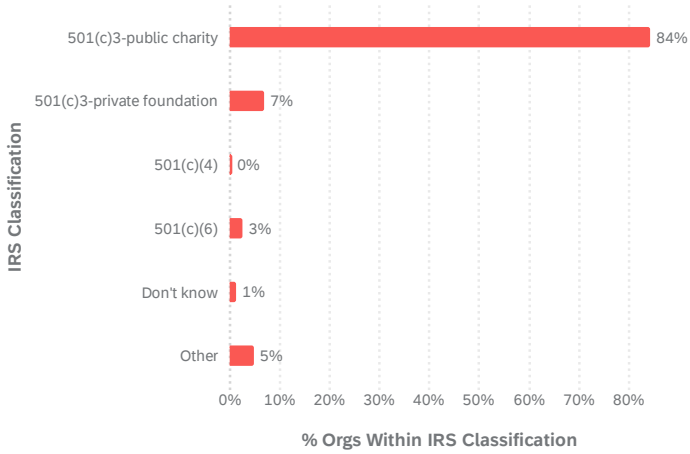
CLP.11 Did all board members receive a copy of the organization's IRS Form 990?

Yes

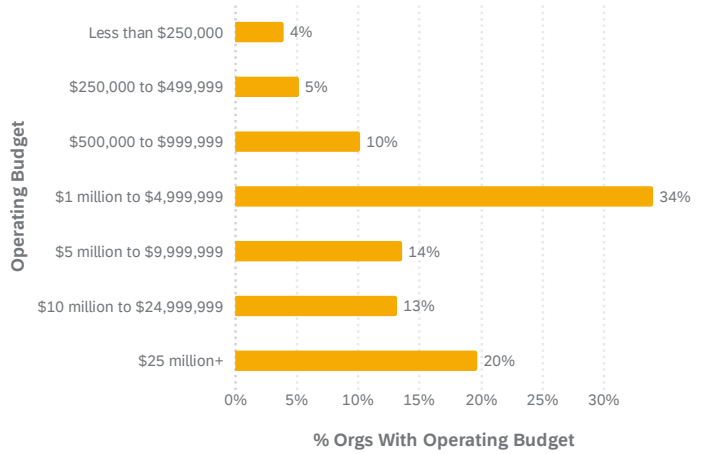
Organizational Demographics

(Reported data reflects responses by Chief Executives who completed the Checklist of Practices section of questions)

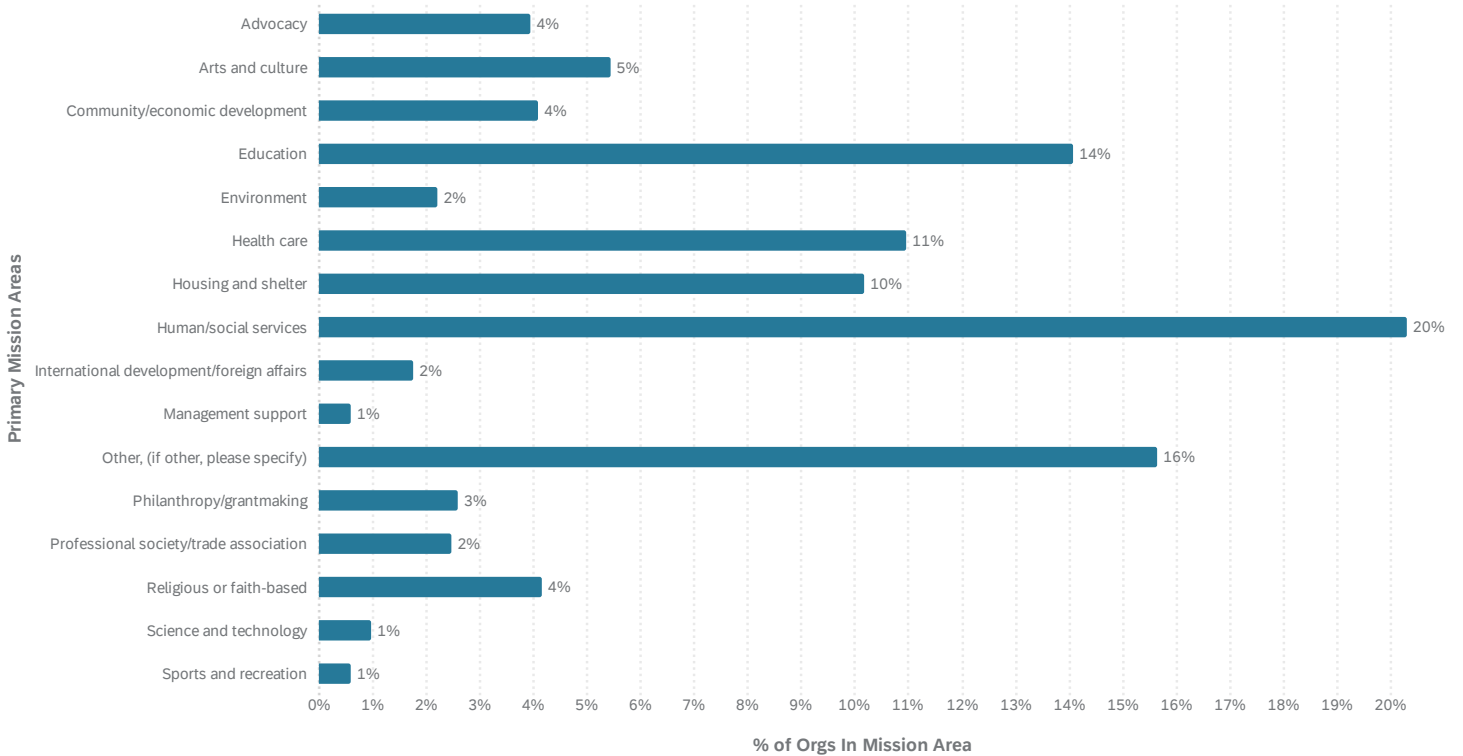
IRS Classification 1,541 ⓘ ⌵



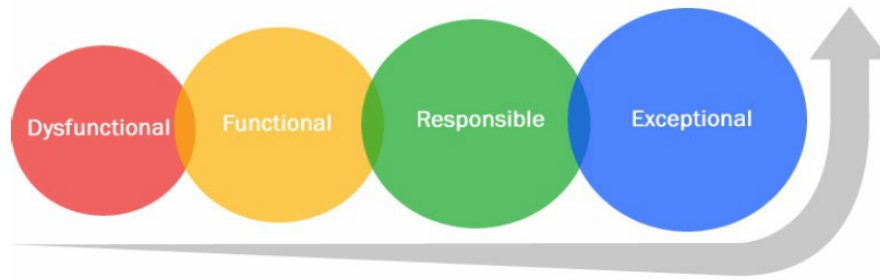
Operating Budget 1,541 ⓘ ⌵



Organization's Primary Mission Area 1,541 ⓘ ⌵



Board Performance Continuum



Taking Actions

Exceptional boards are a strategic asset to be leveraged by the organization. They add significant value and make a discernible difference in the organization's advancement of mission. Use this report as a tool to guide your board on the path to exceptional performance.

Take action. The board self-assessment establishes a platform for setting board priorities. The final step is identifying areas for growth. To help your board do this, consider the following questions:

1. What stands out? Is there anything in the report that is especially surprising, or that you'd like to understand better through conversations as a full board?
2. Does the board seem to be well aligned in terms of its assessment of its performance, or are there indications that different board members are experiencing the board's leadership performance differently? If the latter, why might that be?
3. To what extent is your board meeting its own expectations? In what ways is the board happy with its leadership performance, and where is it signaling a desire to improve? Do any natural priorities emerge from the ratings?
4. Based on what you see in the self-assessment, what are the top one to three areas where you think the board should focus its board development efforts?

Develop a board action plan. Once the board has agreed on its priorities, use a board action plan to help the board develop a clear approach to achieving its goals and staying accountable.

1. What steps can we take to ensure that information from the evaluation is used to improve the performance of the board?
2. Who or what committee is responsible for initiating and leading board development and assessment? Does it have the necessary resources and authority to fulfill its responsibilities?
3. Every board should have clearly established guidelines that outline the duties and responsibilities of individual board members. Are our board members held accountable to these standards? Do we have a process for removing nonperforming board members?

Check your progress. Only the board can hold itself accountable for its own performance. Periodically revisit the results from the self-assessment and action plan, celebrate the successes, and recommit to those areas that need further attention.

Repeat. BoardSource recommends conducting a thorough board self-assessment every two to three years and using the intervening time to work on the action plan you develop.

Deeper Support

Looking to go deeper? Consider investing in the Board Support Program, or reaching out to a consultant from our network.

Board Support Program

BoardSource's [Board Support Program](#) provides year-round governance guidance, resources, and leadership development to you, your board, and your organization.

Key benefits include:

- Complimentary Assessment Product
- Access to the [BoardSource Exchange](#)
- On-demand [Certificate of Nonprofit Board Education](#)
- Ask-an-Expert Email Service
- Members-Only Downloadable & Written Resources

Consultant Directory

BoardSource knows that – many times – there is no replacement for direct support and guidance from a [knowledgeable board consultant](#). That's why BoardSource has built relationships with a broad network of consultants from across the country who bring a wide range of strengths and experiences working with nonprofit boards.

New to selecting a consultant, or need a little help getting started? Check out this resource page:

[Choosing a Consultant FAQ](#)

Contact Us

Assessments Questions: assessments@boardsource.org
Membership or General Inquiries: members@boardsource.org

About BoardSource

About Us

BoardSource envisions a future where the nonprofit community has the leadership to fulfill its purpose and create a just world where all can thrive. Our mission is to inspire and support nonprofit boards and executives to lead justly and with purpose.

Established in 1988, BoardSource's work is grounded in the fundamental belief that boards are critical to organizational success. With decades of hands-on experience working with and supporting nonprofit boards, BoardSource is a go-to resource for nonprofit board and executive leaders. BoardSource supports a broad and diverse cross-section of social sector organizations with

- leadership initiatives addressing key opportunities and issues within the nonprofit sector
- research and benchmarking of board composition, practices, and performance
- membership and board support programs
- performance assessment tools
- a comprehensive library of topic papers, publications, and downloadable infographics, tools, templates and more
- live and virtual education and training

A note to our global readers

The need for effective board leadership and governance knows no geographic boundaries, and BoardSource is committed to strong social sector board leadership and governance around the globe. While BoardSource uses United States laws and policies as the legal framework for our resources and recommendations, most of our resources do not focus on legal matters but rather on good governance practices, making them relevant to organizations working outside of the United States. We do suggest, however, that you refer to applicable laws in your country regarding financial reporting and other legal and transparency issues.

BoardSource is a 501(c)(3) organization.

For more information, please visit our website at www.boardsource.org, e-mail us at mail@boardsource.org, or call us at 800-883-6262.