

Board Assessment Questionnaire

Please rate your organization on each of the following elements of Board functioning and Board-Staff partnering. The survey is designed to raise your awareness of areas of strength, as well as areas that may be impeding the success of your Board of Directors. At the end of the questionnaire is a scoring guide.

| Element | To no extent | To some extent | To a moderate extent | To a large extent | To a great extent |
|---|--------------|----------------|----------------------|-------------------|-------------------|
| 1. Board members are familiar with why their board colleagues have chosen to serve on the board of this organization | 1 | 2 | 3 | 4 | 5 |
| 2. Board members have been identified to serve in key board leadership roles | 1 | 2 | 3 | 4 | 5 |
| 3. We make certain that new members get oriented -- to understand organizational background and to learn about the organization's current situation | 1 | 2 | 3 | 4 | 5 |
| 4. The Executive Director (ED) has respect for the Board Chair | 1 | 2 | 3 | 4 | 5 |
| 5. The ED devotes the time needed to help the board understand enough to function effectively as individuals and as a team | 1 | 2 | 3 | 4 | 5 |
| 6. The ED is inspired by the mission and work of this organization | 1 | 2 | 3 | 4 | 5 |
| 7. Board members know most (or key) staff members: know their name; know the role they play in the organization | 1 | 2 | 3 | 4 | 5 |
| 8. Board leaders (officers and committee chairs) convene meetings regularly | 1 | 2 | 3 | 4 | 5 |
| 9. Our board members understand our financial structure and our funding situation and outlook | 1 | 2 | 3 | 4 | 5 |
| 10. The ED has substantive conversations with the board chair on a regular basis | 1 | 2 | 3 | 4 | 5 |
| 11. The ED has shared his/her expectations and hopes for the board with the board leadership | 1 | 2 | 3 | 4 | 5 |
| 12. The ED is still connected to the program activities and/or clients | 1 | 2 | 3 | 4 | 5 |
| 13. Board members have had the opportunity to work with staff on projects or committees | 1 | 2 | 3 | 4 | 5 |
| 14. Board leaders (officers and committee chairs) are effective in organizing and leading meetings | 1 | 2 | 3 | 4 | 5 |
| 15. Our board members understand the legal responsibilities of serving on a nonprofit corporation's Board of Directors | 1 | 2 | 3 | 4 | 5 |
| 16. The Board Chair and ED have taken time to get to know each other – what motivates them each, what their strengths are | 1 | 2 | 3 | 4 | 5 |

| Element | To no extent | To some extent | To a moderate extent | To a large extent | To a great extent |
|---|--------------|----------------|----------------------|-------------------|-------------------|
| 17. The ED makes working with the board a significant part of his/her work as Executive Director | 1 | 2 | 3 | 4 | 5 |
| 18. The ED speaks to the Board members with enthusiasm for our mission and program | 1 | 2 | 3 | 4 | 5 |
| 19. Board members' regard for one another is strong | 1 | 2 | 3 | 4 | 5 |
| 20. Board members make a concerted effort to attend meetings (board and committee) and feel that their time in those meetings is well-spent | 1 | 2 | 3 | 4 | 5 |
| 21. Our board members have a grasp of where our revenues come from and how nonprofit fundraising works | 1 | 2 | 3 | 4 | 5 |
| 22. The Board Chair and ED discuss how the board and committees function and think together about what's needed | 1 | 2 | 3 | 4 | 5 |
| 23. The ED pro-actively makes time to get in touch with the Board Chair to provide updates and seek counsel | 1 | 2 | 3 | 4 | 5 |
| 24. The ED builds Board members' emotional commitment to our mission | 1 | 2 | 3 | 4 | 5 |
| 25. Board members feel comfortable disagreeing with one another in the context of a discussion about the organization | 1 | 2 | 3 | 4 | 5 |
| 26. Board leaders (officers and committee chairs) are aware of and discuss issues of board member attendance, participation, & involvement | 1 | 2 | 3 | 4 | 5 |
| 27. Our board members understand our organizational culture and values | 1 | 2 | 3 | 4 | 5 |
| 28. The Board Chair and ED partner in thinking through and planning board meetings | 1 | 2 | 3 | 4 | 5 |
| 29. The ED spends time with board leadership – on the phone, in meetings, in email exchanges – as part of his/her job | 1 | 2 | 3 | 4 | 5 |
| 30. In each Board meeting, we hear a story or example of how the organization has made a difference in the community | 1 | 2 | 3 | 4 | 5 |
| 31. Staff members know board members by name and know something about their background | 1 | 2 | 3 | 4 | 5 |
| 32. The Board Chair is responsive and accessible to the Executive Director, and takes time to engage with him/her | 1 | 2 | 3 | 4 | 5 |
| 33. Our board members can describe our (core) programs, who they serve, and our intended outcomes | 1 | 2 | 3 | 4 | 5 |
| 34. The Board Chair and ED have discussed who else on the board might move into board leadership in the near future | 1 | 2 | 3 | 4 | 5 |

BOARD VERSION

| Element | To no extent | To some extent | To a moderate extent | To a large extent | To a great extent |
|--|--------------|----------------|----------------------|-------------------|-------------------|
| 35. The Board Chair and ED think together about how to strengthen the board's contribution to the organization | 1 | 2 | 3 | 4 | 5 |
| 36. Board members have opportunities to discuss organizational purpose, mission and success | 1 | 2 | 3 | 4 | 5 |
| 37. Staff members are upfront and honest about issues in the organization when talking with board members | 1 | 2 | 3 | 4 | 5 |
| 38. Board leadership is comfortable asking board colleagues to take on responsibilities and assigning tasks | 1 | 2 | 3 | 4 | 5 |
| 39. Board members are familiar with the current climate facing our sector and what is impacting our clients and our organization | 1 | 2 | 3 | 4 | 5 |
| 40. The Board Chair is comfortable <i>giving</i> the ED feedback and receiving feedback <i>from</i> the ED | 1 | 2 | 3 | 4 | 5 |
| 41. The ED welcomes the board's involvement in considering organizational direction and strategy | 1 | 2 | 3 | 4 | 5 |
| 42. Board members can see the connection between their work & contributions and our organization's success | 1 | 2 | 3 | 4 | 5 |

BOARD ASSESSMENT QUESTIONNAIRE SCORING GUIDE

In each numbered box below, write the number of the score that you gave to the element of the same number in the Assessment Questionnaire. For example, if you rated Element #1 as "3, To a moderate extent," write 3 in the box numbered "1."

| A | B | C | D | E | F |
|---|-----|-----|-----|-----|-----|
| 1. | 2. | 3. | 4. | 5. | 6. |
| 7. | 8. | 9. | 10. | 11. | 12. |
| 13. | 14. | 15. | 16. | 17. | 18. |
| 19. | 20. | 21. | 22. | 23. | 24. |
| 25. | 26. | 27. | 28. | 29. | 30. |
| 31. | 32. | 33. | 34. | 35. | 36. |
| 37. | 38. | 39. | 40. | 41. | 42. |
| <i>Add the scores in each column and enter the totals in the boxes below.</i> | | | | | |
| | | | | | |

SCORES:

- Column **A** = Relationship among Board members and between Board and Staff _____
- Column **B** = Board leadership: awareness, skills & know-how _____
- Column **C** = Knowledge-readiness of Board members _____
- Column **D** = Board Chair – Executive Director partnership _____
- Column **E** = ED readiness and desire to build the board _____
- Column **F** = Passion for the organizational mission _____

Scores interpretation:

- 27-35: You're doing *great* in this area! Make the most of it.
- 18-26: This is an area worth focusing on to improve Board effectiveness
- 9-17: This is an area in need of attention
- 0-8: This is an area that may become critical if not tackled