



# BSA report

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BOARD SELF-ASSESSMENT

Filtering by: XYZ Sample Report

## XYZ Sample Report

## Results Overview At-A-Glance

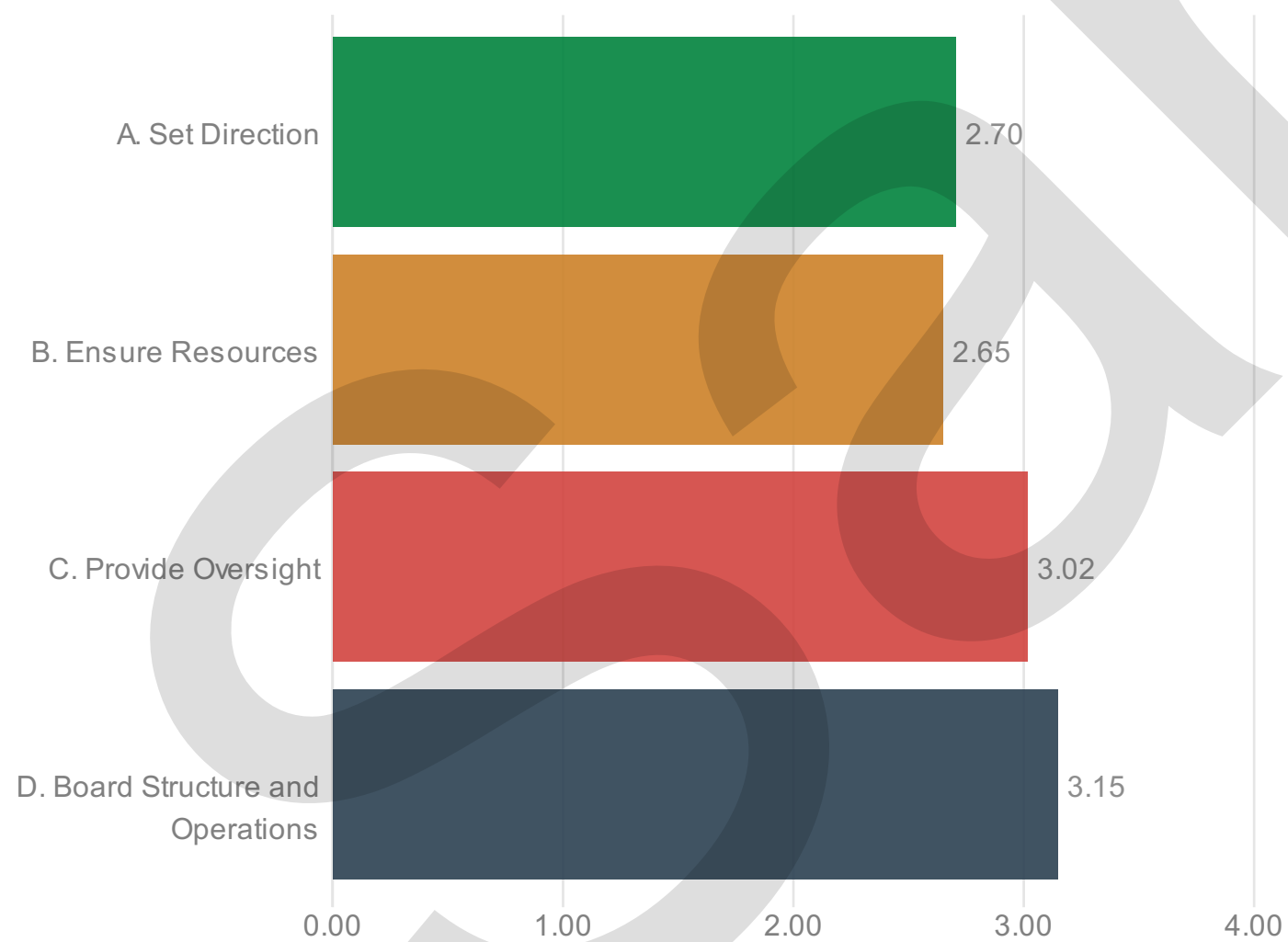
The assessment is divided into four board roles; nine areas of responsibility are incorporated within those roles. The scores for individual questions are averaged within each area of responsibility, and the scores for each responsibility are then averaged within each role. These board roles and responsibilities are based on *Ten Basic Responsibilities of Nonprofit Boards*.

The scores below are based on this answer scale: 0 = Poor; 1 = Fair; 2 = OK; 3 = Good; 4 = Excellent.

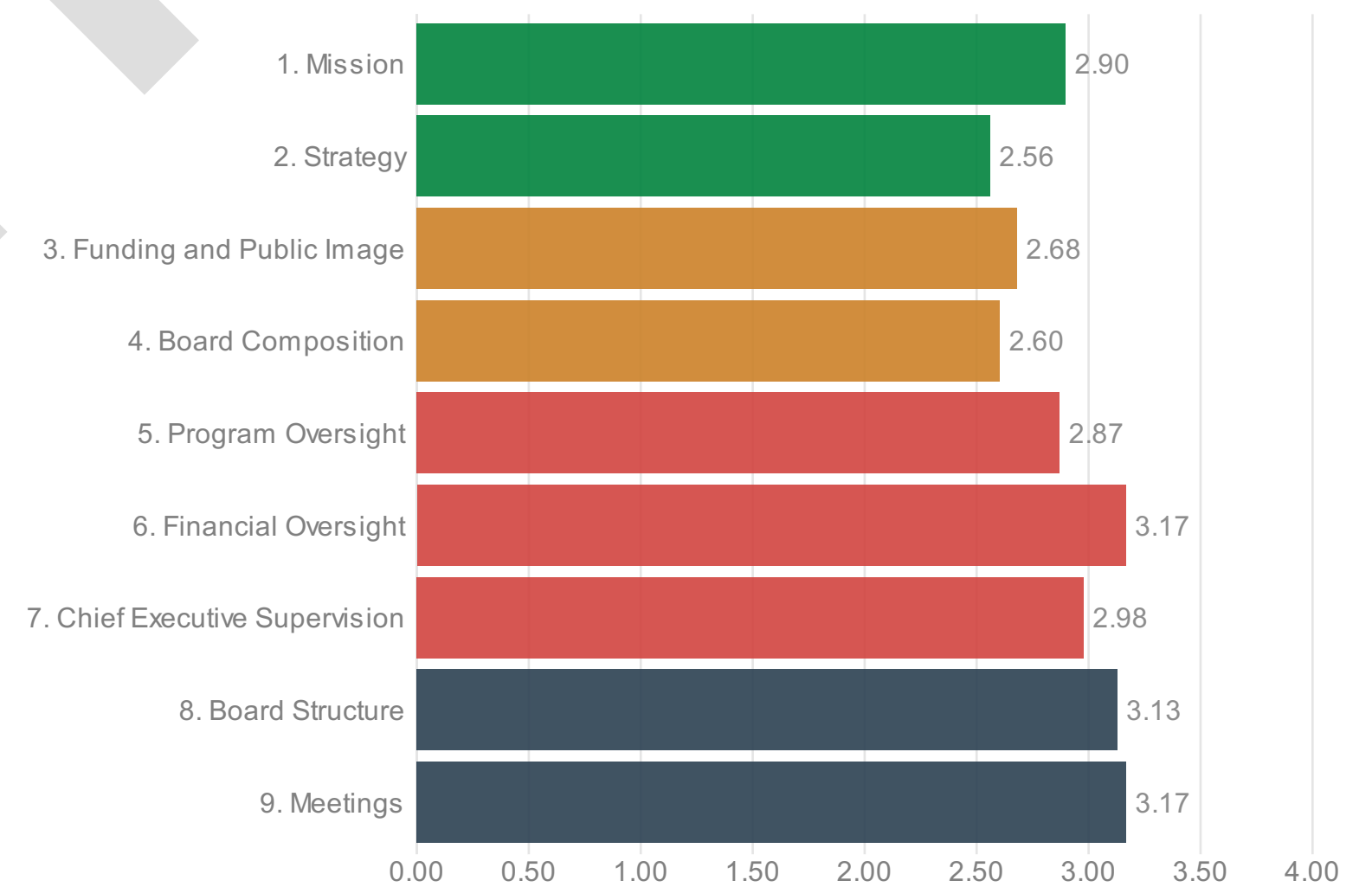
### Roles and Responsibilities Overview

The graph below shows how your board has assessed its performance in the four roles (letter bars) and nine responsibilities (number bars) of nonprofit boards.

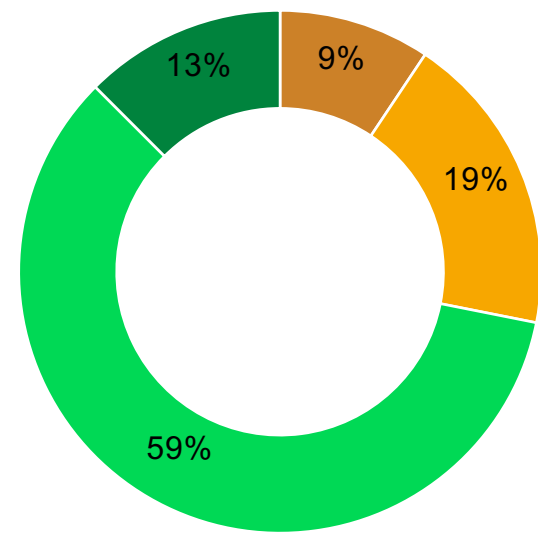
Your Board's Role Scores



Your Board's Responsibility Scores

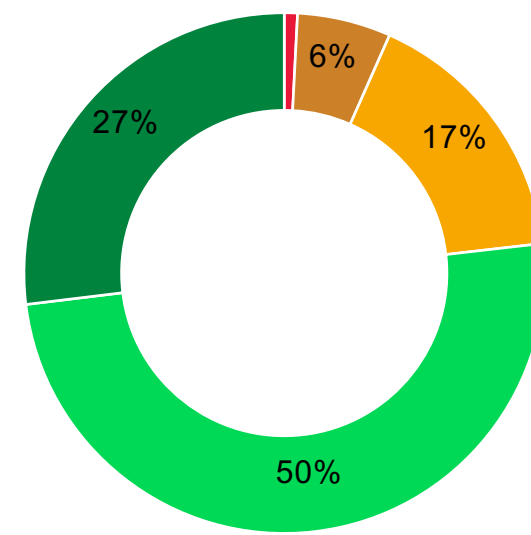


### Your Board



Very Satisfied Satisfied Neutral Dissatisfied

### All Boards

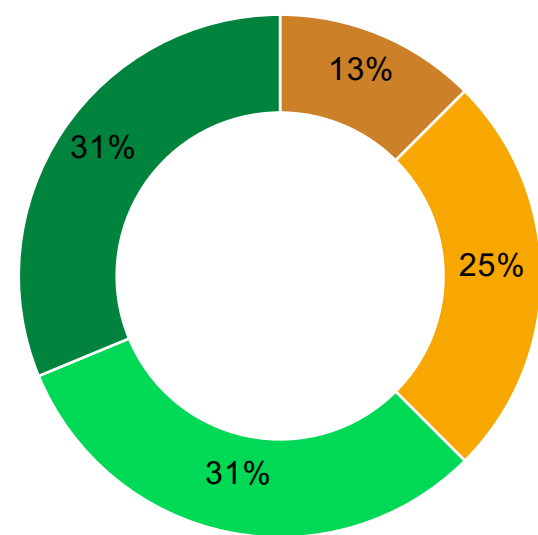


Very Satisfied Satisfied Neutral Dissatisfied Very Dissatisfied

## Level of Commitment and Involvement

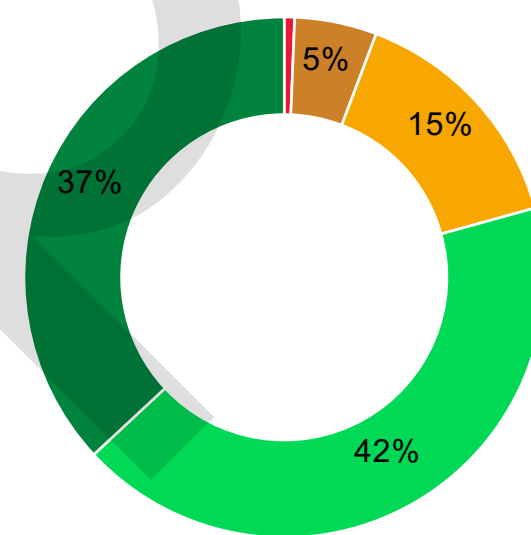
The board self-assessment survey asks board members to identify their fellow board members' level of commitment and involvement, typically described as board engagement. Engaged board members make it a priority to attend and participate in all board meetings, take initiative, and jump into action when the chief executive needs expert guidance or opinion. Furthermore, engaged board members use their personal connections and affiliations to introduce the organization to potential funders and suitable board member candidates, volunteer for leadership positions on the board, and, by example, encourage others to do the same. The graphs below show the board's level of satisfaction with its commitment and involvement.

### Your Board



Very Satisfied Satisfied Neutral Dissatisfied

### All Boards

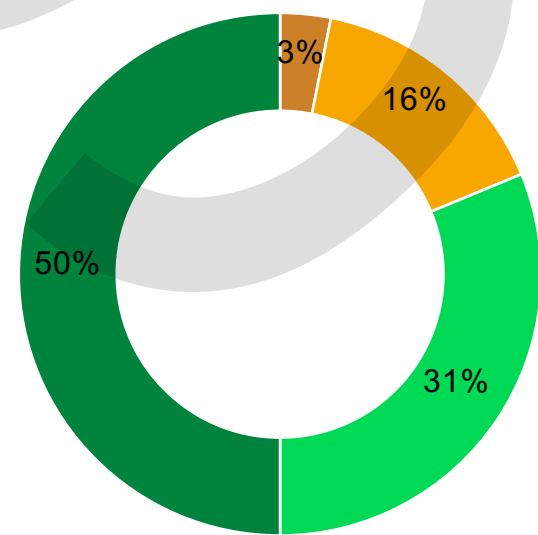


Very Satisfied Satisfied Neutral Dissatisfied Very Dissatisfied

## Individual Board Member Experience

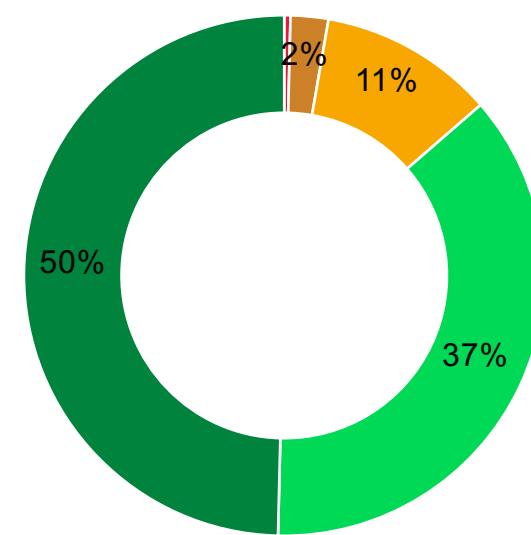
Individuals serve on nonprofit boards for a variety of reasons. The percentages in this graph provide an overall sense of whether your individual board members feel that they have adequate opportunities to use their time, talent, and expertise to advance the mission of your organization.

### Your Board



Very Satisfying Satisfying Neutral Disappointing

### All Boards



Very Satisfying Satisfying Neutral Disappointing Very Disappointing

## General Open-Ended Responses

Comments appear exactly as they were entered in the survey, but in randomized order.

Most important areas the board should address to improve its performance in the next year or two?

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Identify alternative revenue generating businesses and take tactical steps to achieve them

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Fund raising (in terms of dollars amounts) and brand recognition to the public to increase donations

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Find Board Members that are well connected in the community and can make an immediate impact

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Continue to work on board member recruitment in key areas; continue to improve fund-raising

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The long term viability of the organization is dependent on the required services needed are met with a best in class solution.

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## XYZ Sample Report

# A | Setting Direction

(includes Mission and Strategy)

One of the board's primary roles is to set direction and outline strategies for achieving goals. 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 guide individual and organizational behavior. By articulating these principles, the board establishes guideposts that help chart direction for years ahead.

Effective and strategic board members 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. Refer to your mission, vision, and value statements when making decisions.
2. When necessary, refine your statements,
3. Share the statements with all board candidates and new board members.
4. Work together with the chief executive to provide guidance and input in developing the strategic planning process.
5. Incorporate strategic thinking into every board meeting rather than relegating it to the annual retreat agenda.

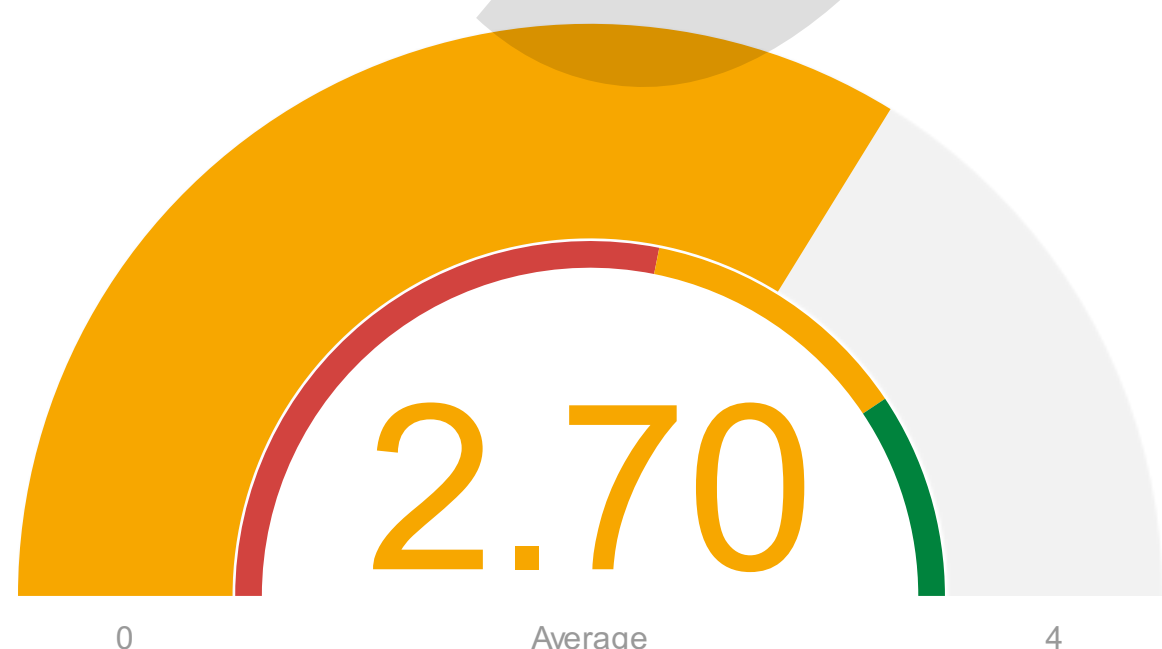
### Recommended Resources - Mission and Vision

- 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](#)

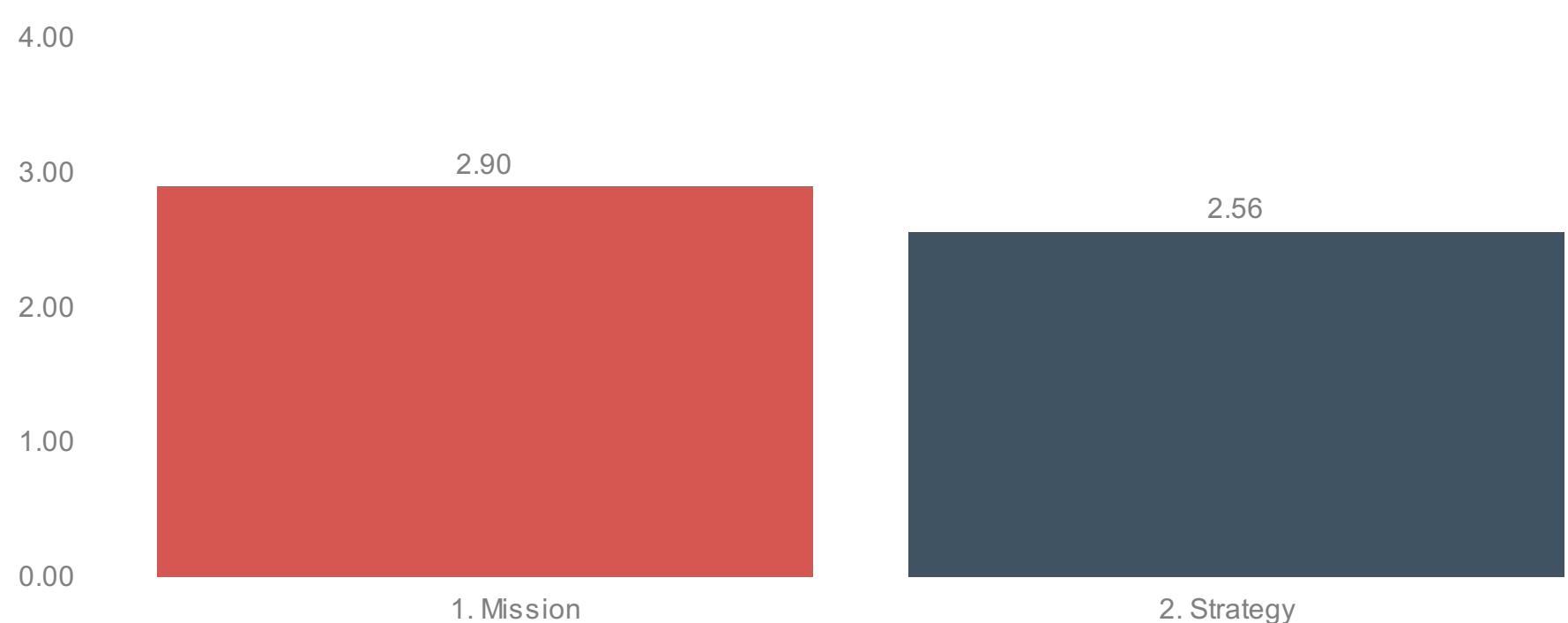
### Recommended Resources - Strategy

- 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](#)

Your Setting Direction Role Score



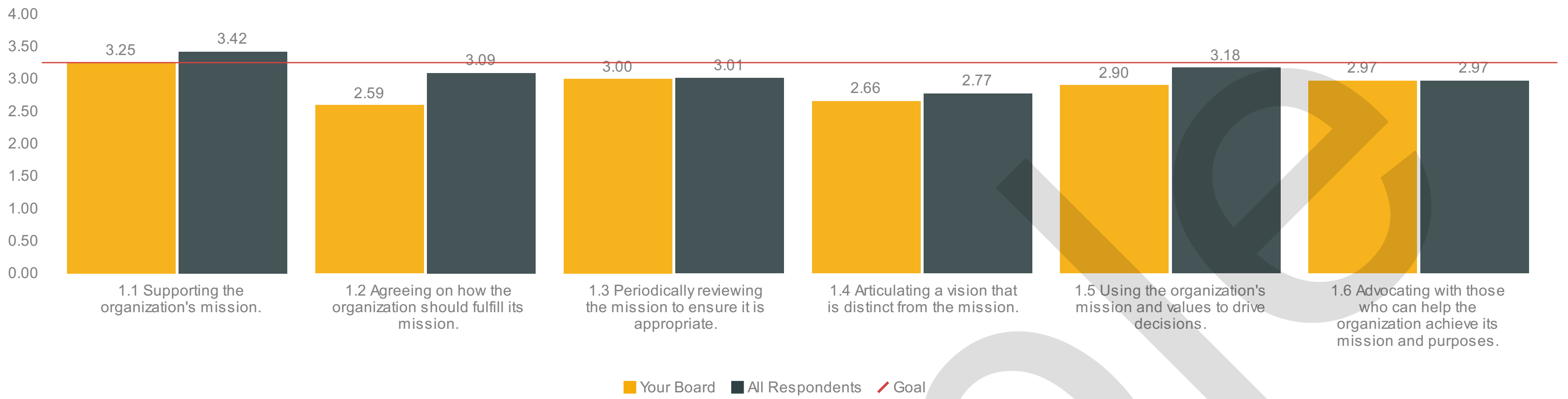
Your role score is based on the following responsibility scores:



# Mission | Section Detail

One of the board's fundamental roles is setting direction for the organization. A good statement of mission and purposes serves to guide organizational planning, board and staff decisions about programs and services, volunteer initiatives, and priorities among competing demands for scarce resources. The board, working closely with the chief executive, should review and periodically revise the mission statement, if necessary, and promote the organization outside of the boardroom.

## Average Score



## Question Breakdowns

(Please rate the board's performance in...)



1.1 Supporting the organization's mission.



1.2 Agreeing on how the organization should fulfill its mission.



1.3 Periodically reviewing the mission to ensure it is appropriate.



1.4 Articulating a vision that is distinct from the mission.

