



# BSA

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## BOARD SELF-ASSESSMENT

**SAMPLE REPORT**

*Please take a moment to review this SAMPLE report. It is intended to give you a feel for the survey process, the types of questions asked, and how your board's performance results are reported back to you. Keep in mind this is only a small portion of the actual survey and the data shown in the report does not reflect real user information.*

This state-of-the-art report features:

**A dashboard-style report with 50+ colorful visual gauges, bar charts, and question breakdowns.**

- Allows you and your board leaders to get a quick visual overview of your board's performance results in ten areas of board responsibility framed around its people, work, culture, and impact.
- The gauges are various shades of green, yellow, and red, depending on where your board's performance scores fall. Like traffic lights, green is good — it means you're doing well in this area. Yellow indicates that you should consider adjusting some of your practices. Red, well, that means you should make changes in this area a priority.
- The degree of consensus around each survey question is now shown through bar graphs indicating the percentage of respondents who answer each question in a particular way, enabling you to determine the level of agreement among your board members. For example, 28 percent answered excellent, 25 percent answered good, 19 percent answered OK, etc.

**Benchmarking against your peers — at no extra cost.**

- Wondering how your board stacks up against others who have taken a similar version of the BSA? Benchmarking is now included in the core report for no additional fee.
- Benchmarking information is presented through visual gauges and graphs that appear side-by-side with your board's results in each area of performance.

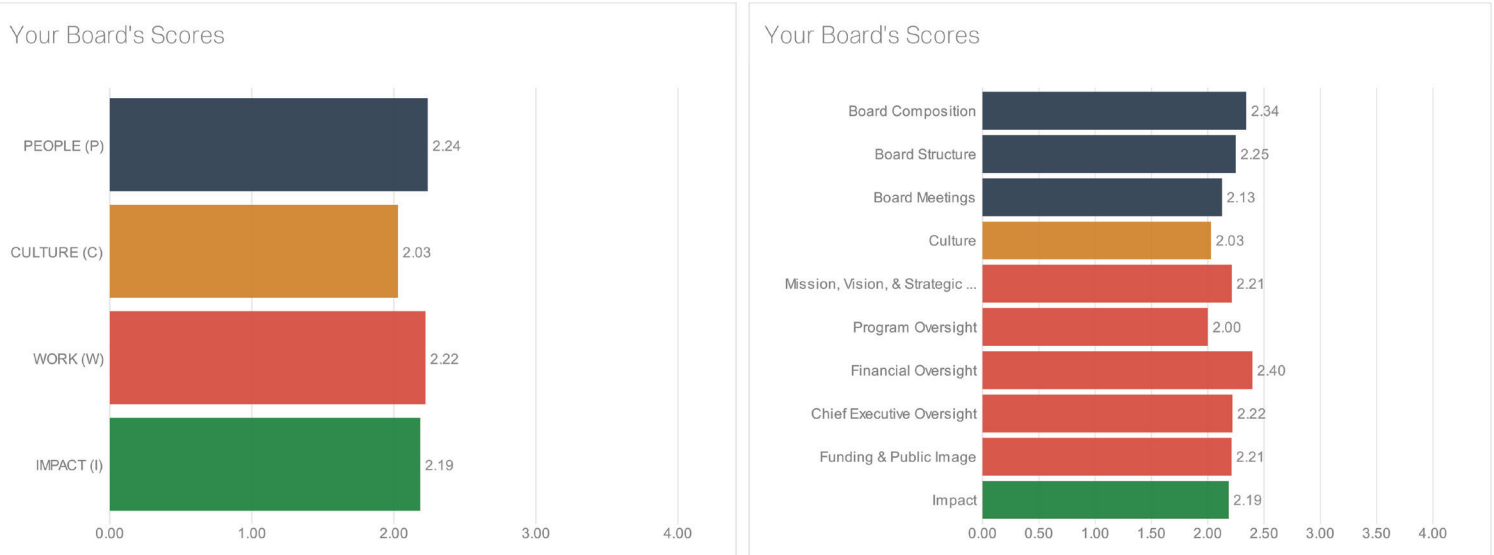
# RESULTS OVERVIEW AT-A-GLANCE

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. These board responsibilities and categories align with [Leading With Intent](#), BoardSource's national index of nonprofit board practices.

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

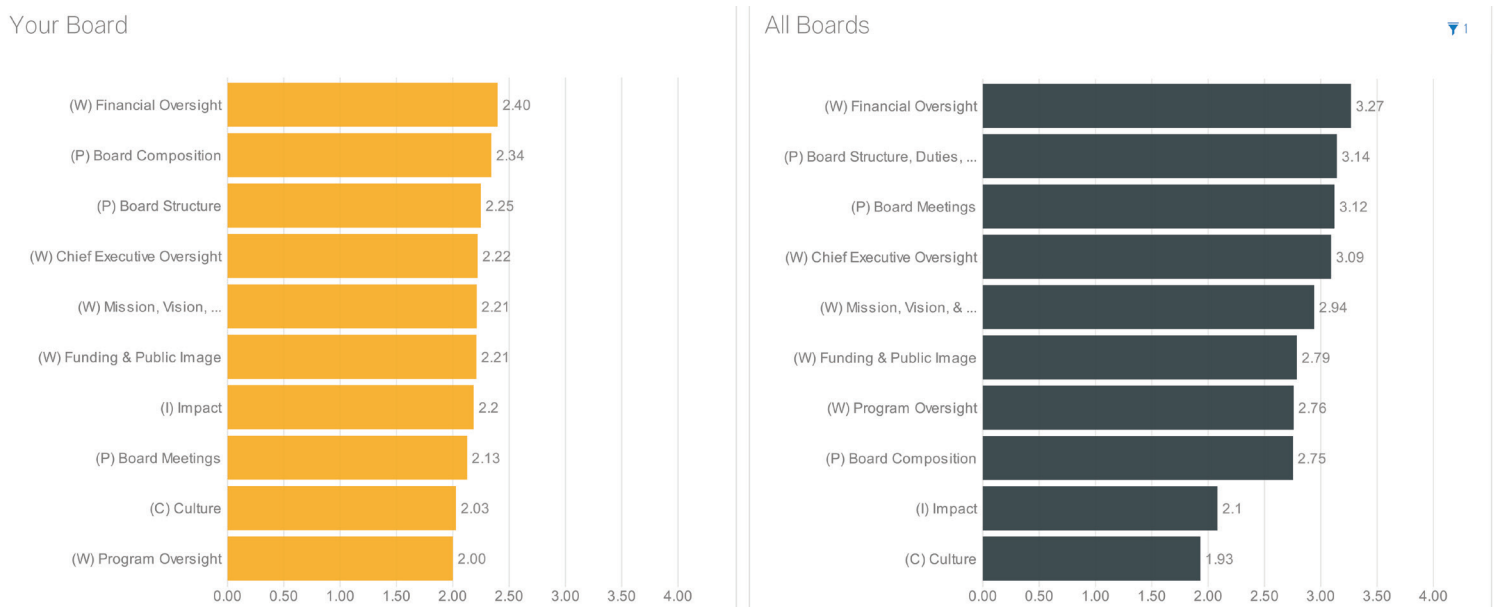
## Results Overview

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



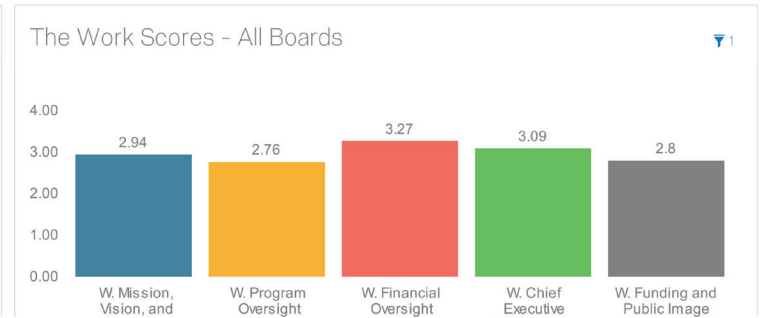
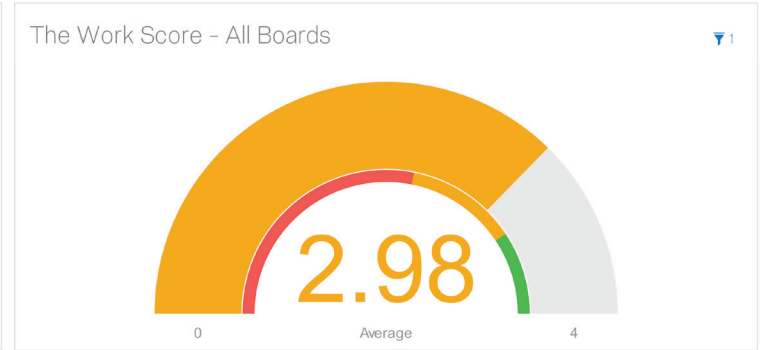
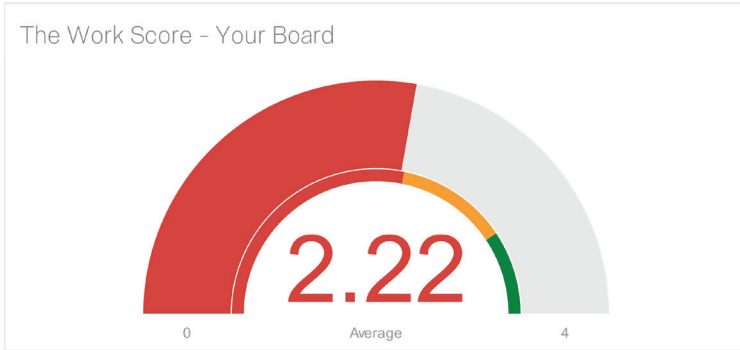
## Highest to Lowest Ranked Responsibilities

The graph below shows how your board has assessed its performance — from highest to lowest — in the ten areas of responsibility. Bars at top indicate strong performance. Bars in middle highlight areas in which the board is performing at an acceptable level but may want to watch. Bars at bottom indicate responsibilities that need attention.



## Includes Mission, Vision, and Strategic Direction; Program Oversight; Financial Oversight; Chief Executive Supervision and Oversight; Funding and Public Image

Boards are charged with important responsibilities. This section explores how well boards are fulfilling their basic, strategic and adaptive, and external and ambassadorial leadership roles.



# MISSION, VISION, AND STRATEGIC DIRECTION | SECTION DETAIL

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 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. To further carry out its role in setting direction, the board is actively involved in strategic planning and thinking. Typically, the board engages in a formal planning process every few years. Then, it monitors progress against that plan. The board also needs to understand the organization's clients and stakeholders, as well as the internal and external operating environments, so it can respond appropriately as opportunities and challenges arise. The board focuses its efforts primarily on long-term, strategic issues, rather than short-term operational and administrative matters.

- 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 boards 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.

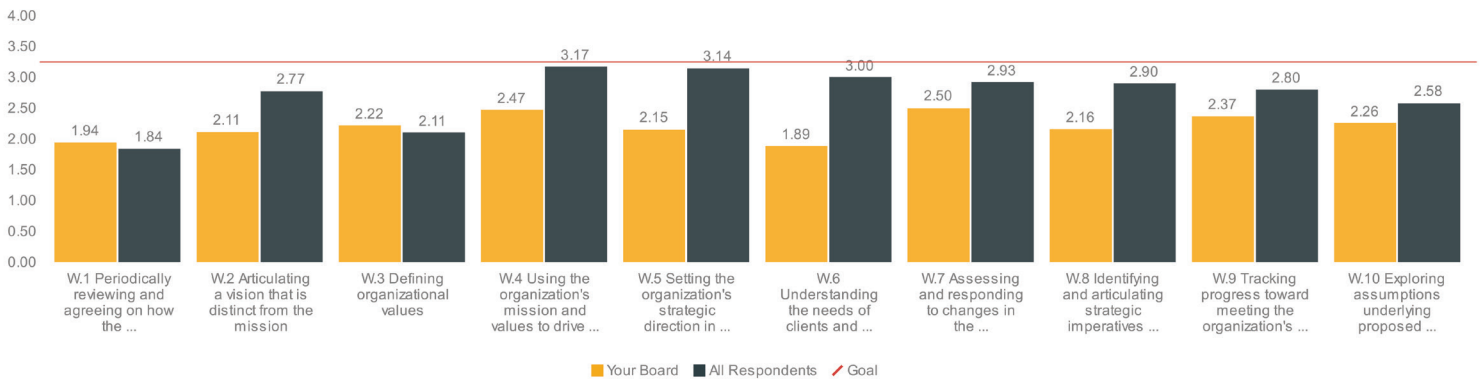
## Strengthen Performance through Action

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, 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

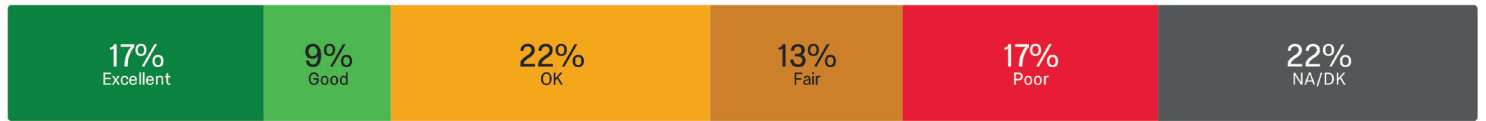


## Question Breakdowns (Please rate the board's performance in the following:)

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

See next page

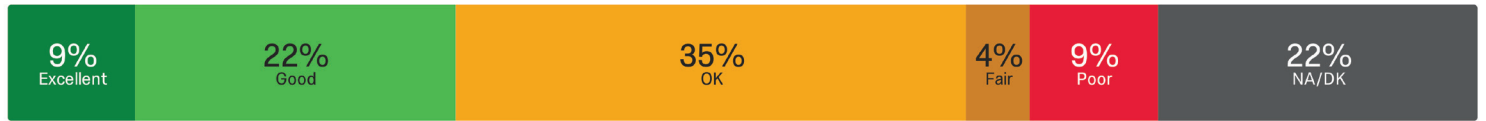
W.1 Periodically reviewing and agreeing on how the organization should fulfill its mission.



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



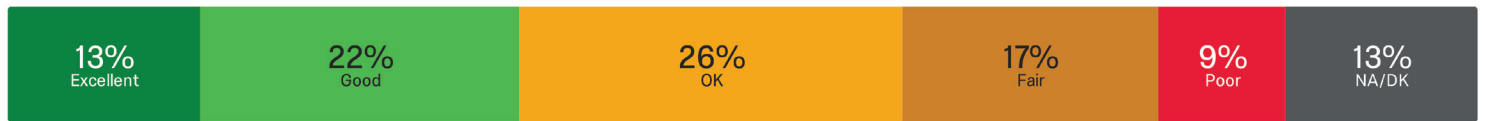
W.3 Defining organizational values.



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



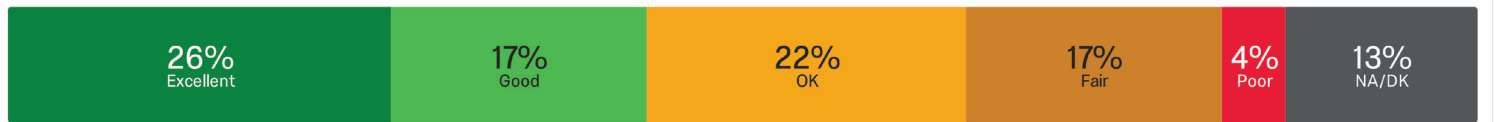
W.5 Setting the organization's strategic direction in partnership with the chief executive.



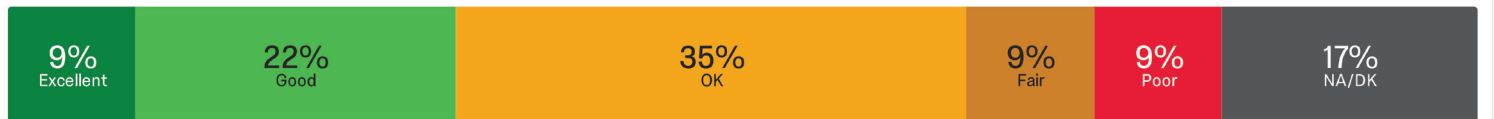
W.6 Understanding the needs of clients and stakeholders and how they may be changing.



W.7 Assessing and responding to changes in the organization's environment.



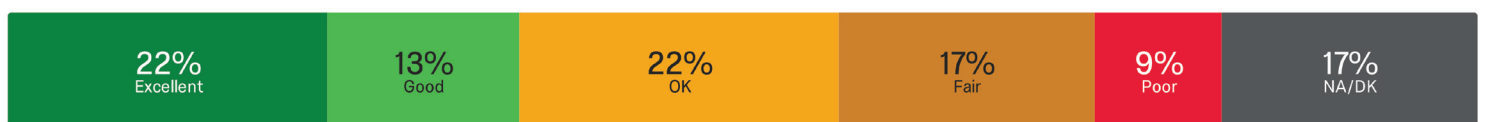
W.8 Identifying and articulating strategic imperatives and goals for the organization through a thoughtful strategic planning process.



W.9 Tracking progress toward meeting the organization's strategic goals.



W.10 Exploring assumptions underlying proposed strategies, alternatives, and consequences before making critical decisions.



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

- Our board demographics do not reflect the demographics of our constituents. How can we expect to know the needs of our organization's environment and stakeholders when without a diverse board?
- We do a great job at tracking our decisions against our strategic plan, but the play is 8 years old. We really need to update!
- Love the new dashboard format we use in board materials to show progress against our organizational goals. Kudos to Judy for the redesign of the board book!

## How can the board improve its performance in this area?

- I would like to see us recruit some of our constituents onto our board, rather than just seeking out big name corporate leaders who aren't connected with the communities we serve. I'm sure we can better balance need for fundraising with connections to our service community.
- Serving on the strategic planning task force last year was one of the most informative and fulfilling board experiences I've ever had. I feel much more connected to the organization's goals now that I played such an integral role in setting them.

## FINANCIAL OVERSIGHT | SECTION DETAIL

Boards are responsible for preserving an organization's resources, protecting its assets, and maintaining its legal and ethical integrity. Ensuring that income is managed wisely is especially important for a nonprofit because it operates in the public trust. The board approves the annual budget and then monitors performance against the budget throughout the year. The board also oversees the annual audit to verify for itself and the public 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.

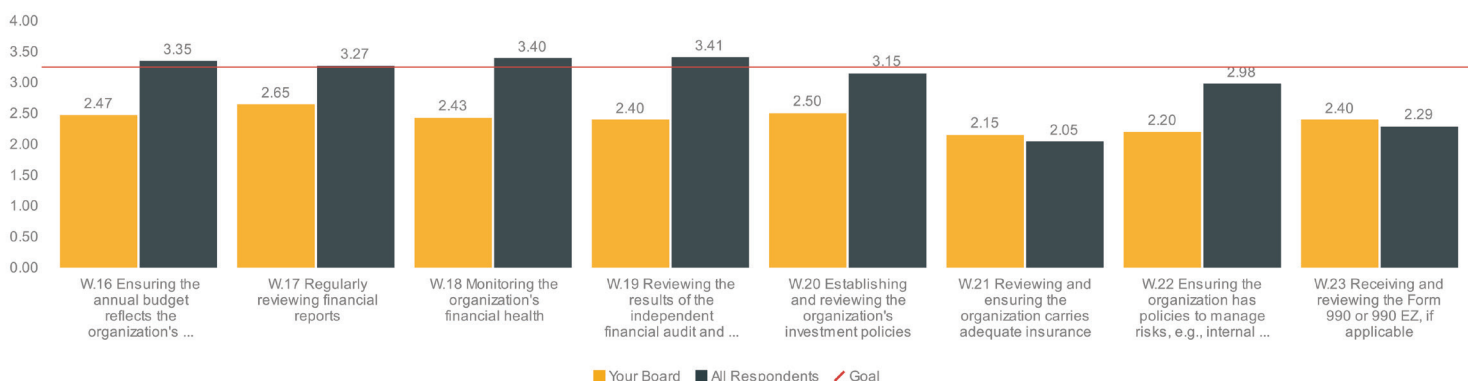
### Strengthen Financial Oversight through Action

1. ALL board members must fulfill their fiduciary responsibility to oversee the financial health of the organization.
2. Financial oversight cannot be delegated to a committee but can be supported by the work of a committee.
3. Board development should include resources to assist board members in understanding nonprofit financial basics.
4. Ensure that all necessary financial policies and controls are in place and being followed.
5. Set up and monitor key financial indicators.
6. Monitoring financial sustainability goes beyond reviewing financial reports; it requires reviewing short- and long-term trends in revenue streams, expenses, and programs.
7. Work with the chief executive to understand and oversee the organization's legal obligations.

### 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](#)

### Average Score

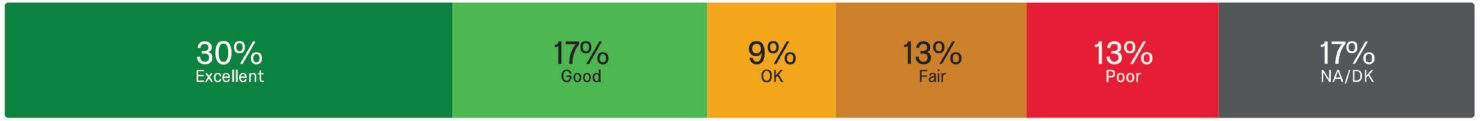




## Question Breakdowns (Please rate the board's performance in the following:)

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

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



W.19 Reviewing the results of the independent financial audit and management letter.



W.20 Establishing and reviewing the organization's investment policies.

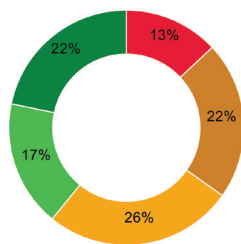


## BOARD SERVICE EXPERIENCE

### Overall Effectiveness

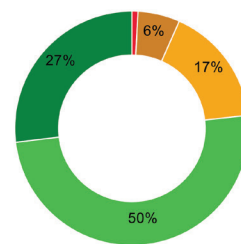
The following graphs reflect the board's thinking about its overall effectiveness. Because the percentages are based on the perceptions of your individual board members, this information can be used to spark a full board discussion on whether the members feel they are collectively meeting their responsibilities.

Your Board



■ Very Satisfied 
 ■ Satisfied 
 ■ Neutral 
 ■ Dissatisfied 
 ■ Very Dissatisfied

All Boards



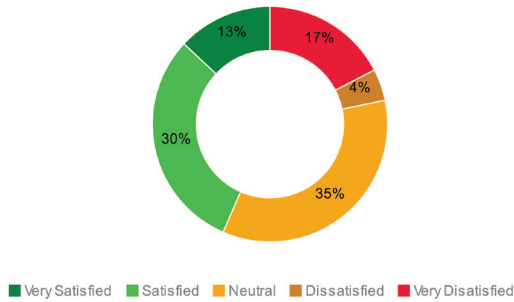
■ Very Satisfied 
 ■ Satisfied 
 ■ Neutral 
 ■ Dissatisfied 
 ■ Very Dissatisfied



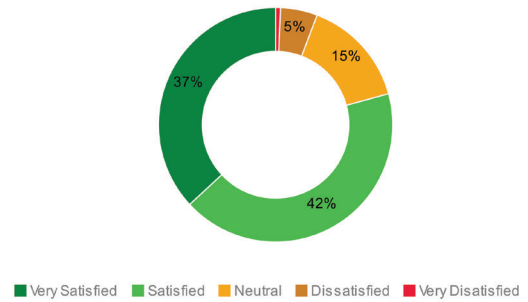
## Level of Commitment and Involvement

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



All Boards



## GENERAL OPEN-ENDED RESPONSES

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

### What are the two or three most important areas the board should address to improve its performance over the next year or two?

- We should be intentionally recruiting diverse board candidates and improving our diversity, inclusion, and equity practices and policies.
- We have a tendency to get distracted by program details. We need to remain at the strategy and governance level, not get sucked into the minutiae.
- We are looking to launch a capital campaign, but many board members do not adequately participate in fundraising activities. Can we invest in some board training to better position us to meet our goals?
- This was a great tool for looking at our board strengths and weaknesses. Let's plan to do it again in two years so we can see if our intentional governance work helped us improve performance!