

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.

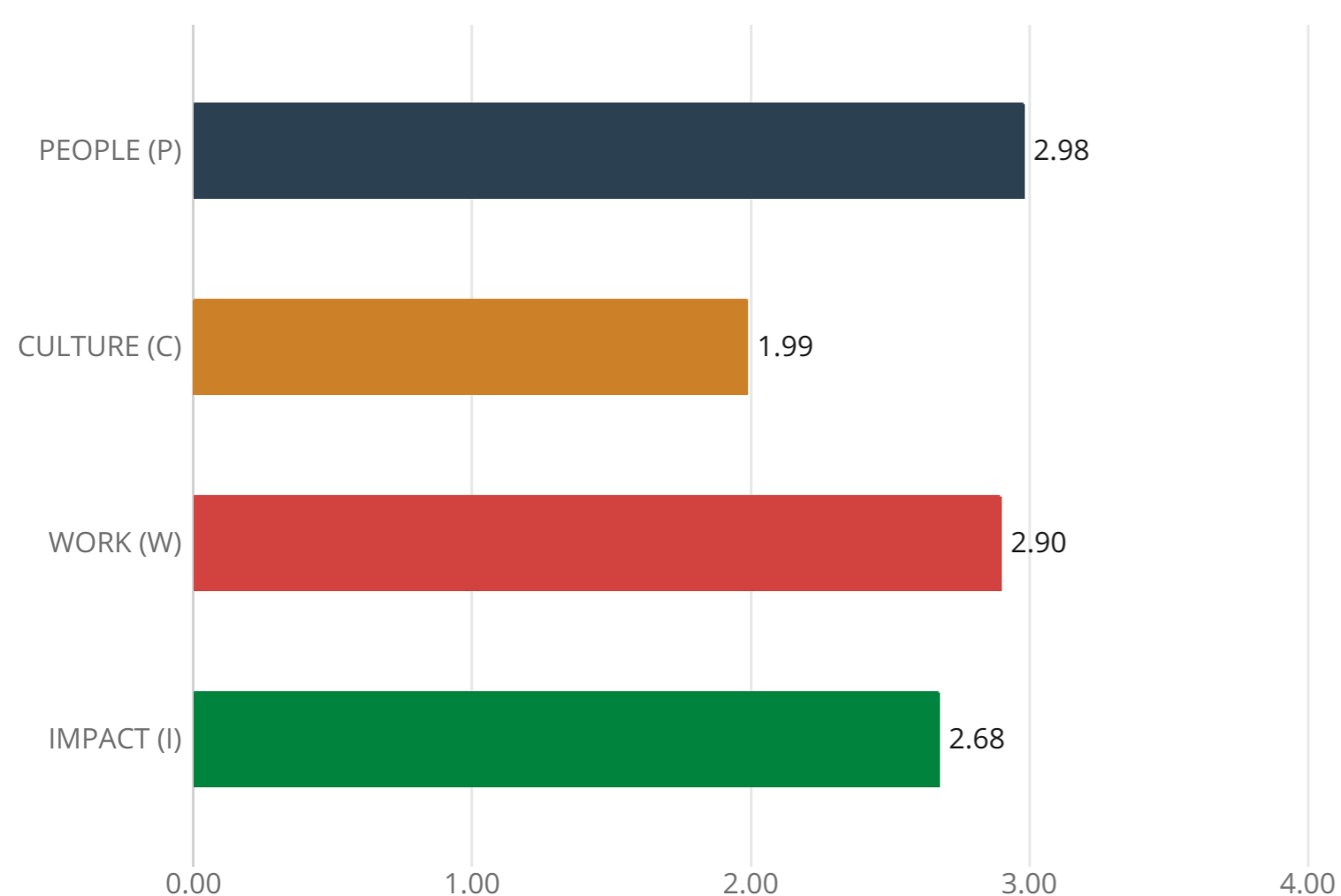
As you read through this report, we encourage you to familiarize yourself with [Leading with Intent](#), as well as with one of BoardSource's most popular books, [Navigating the Organizational Lifecycle: A Capacity-Building Guide for Nonprofit Board Leaders](#).

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

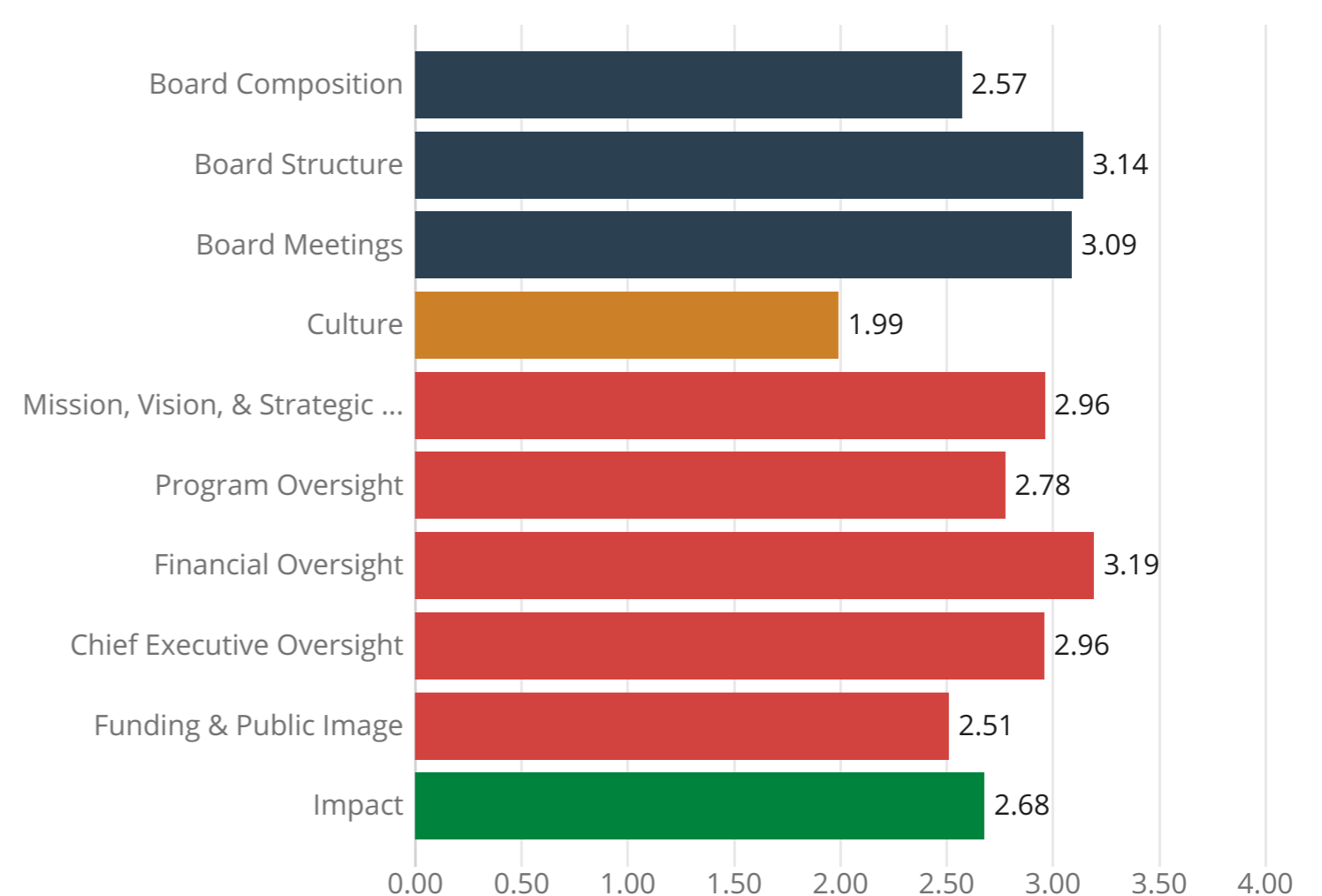
Results Overview

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

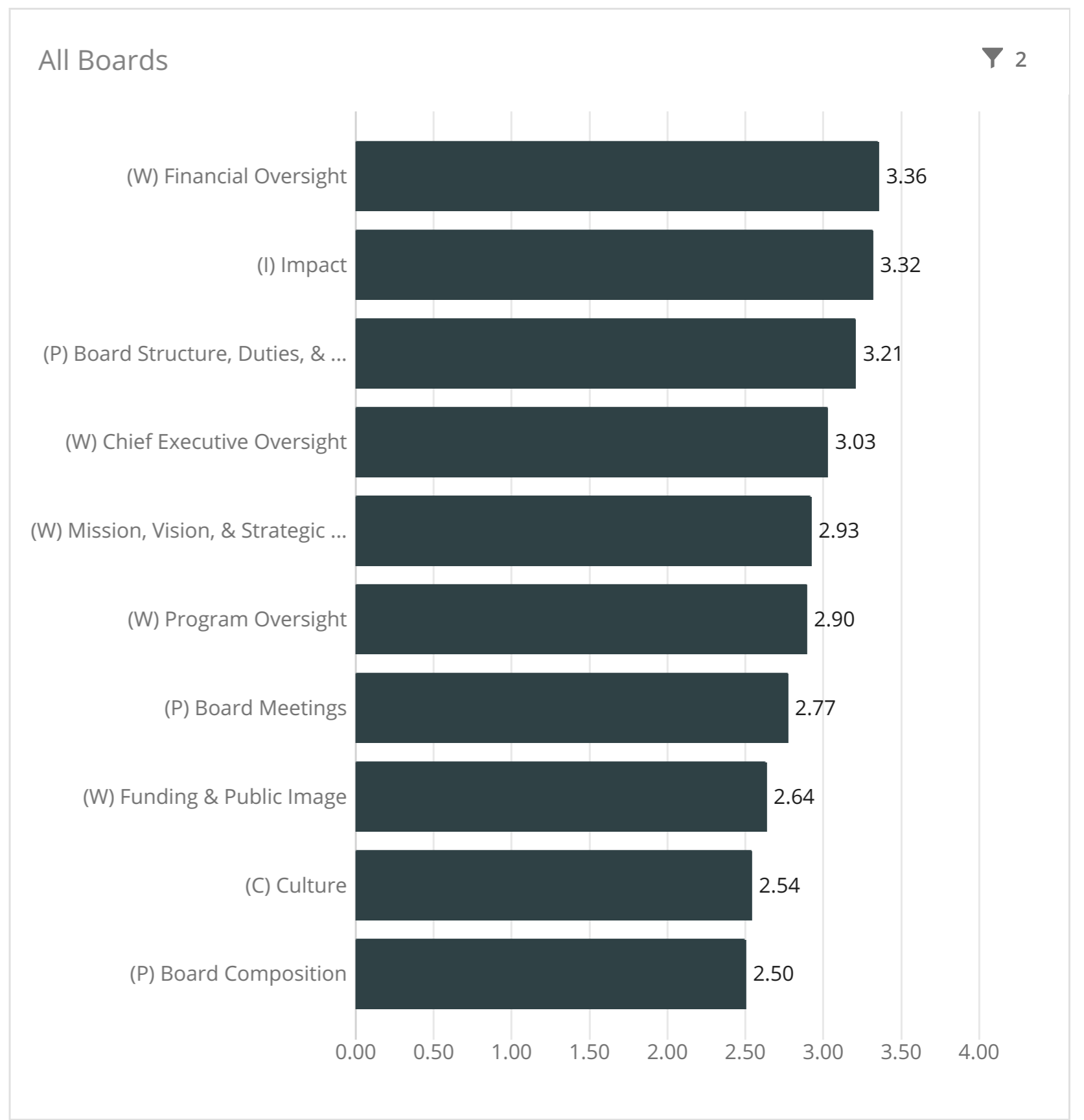
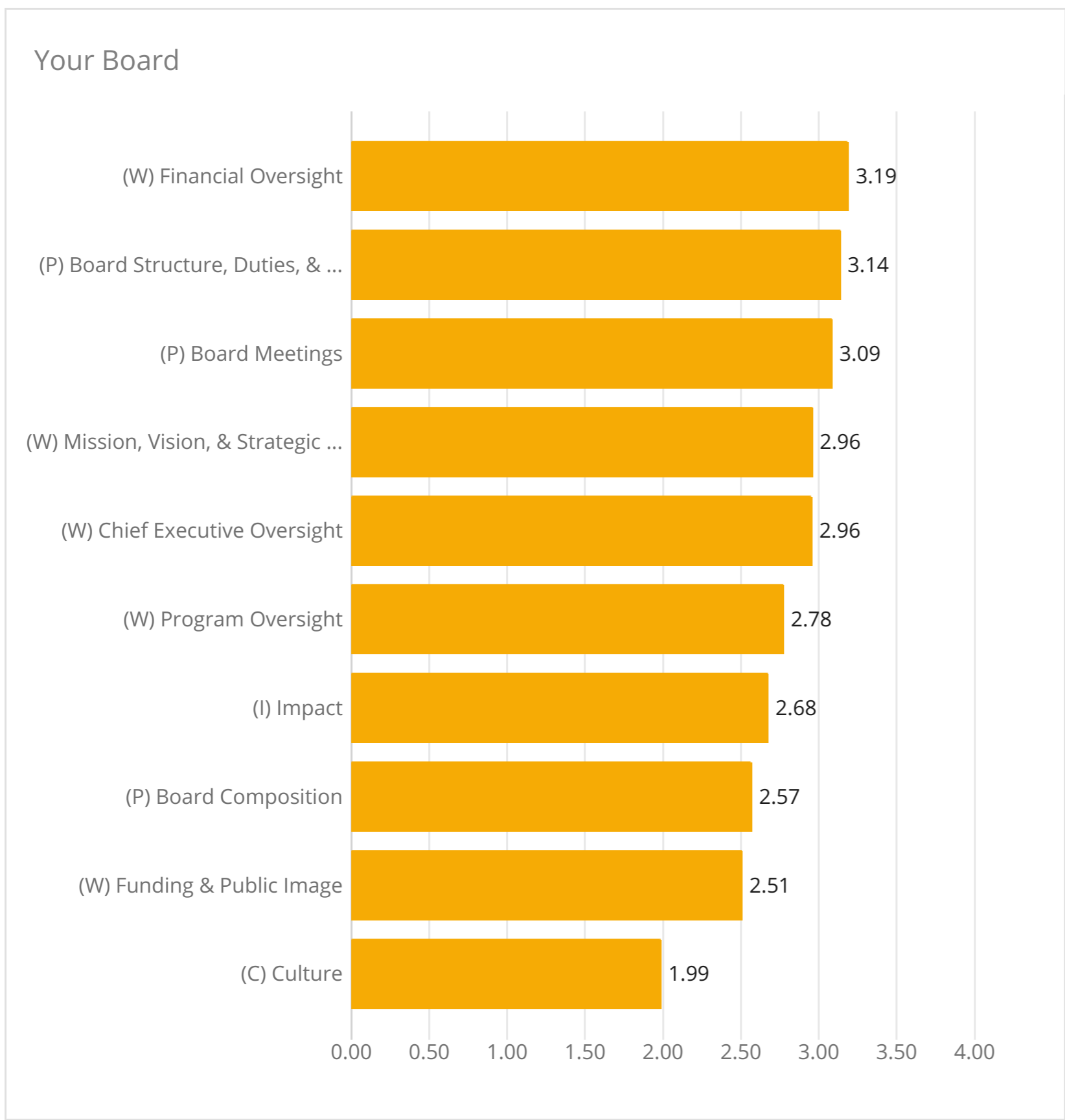


Your Board's Scores



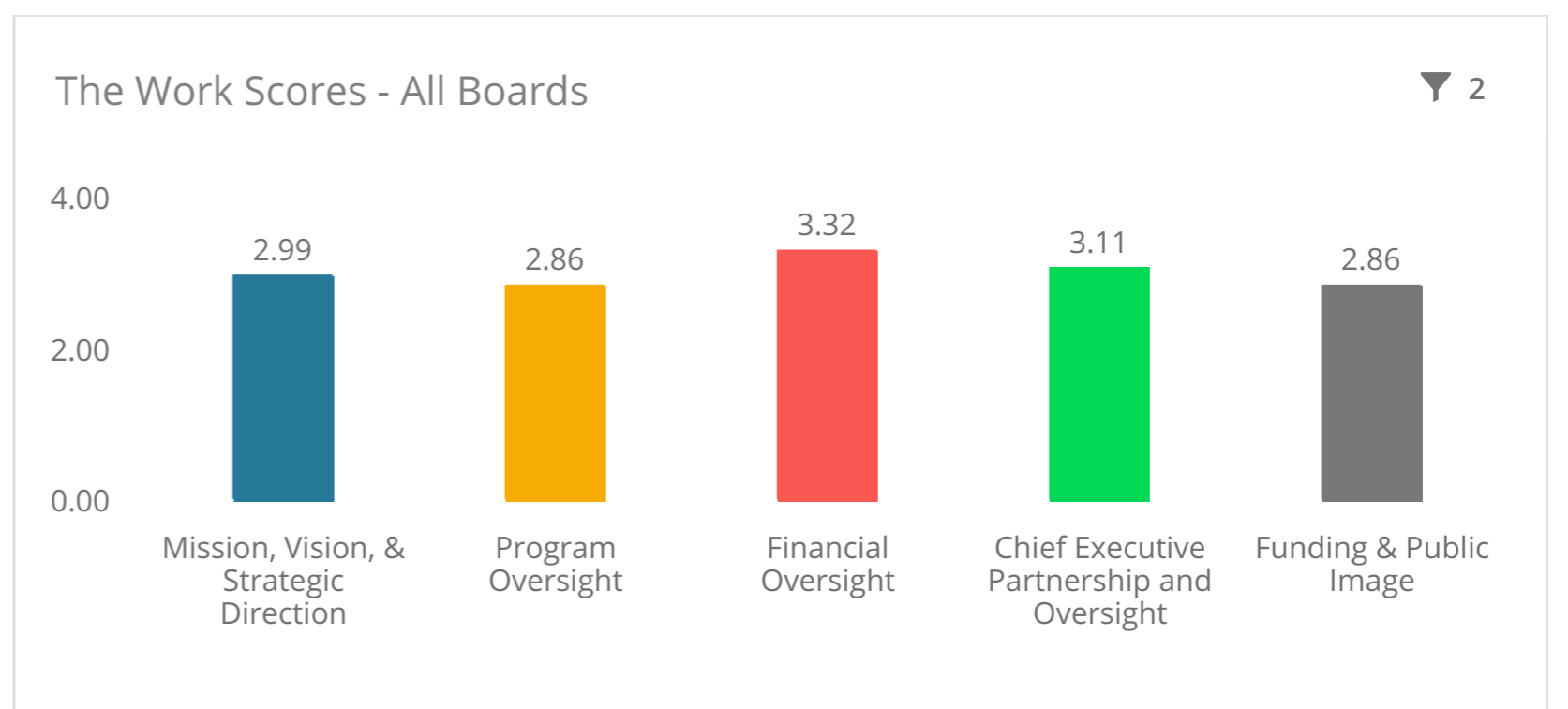
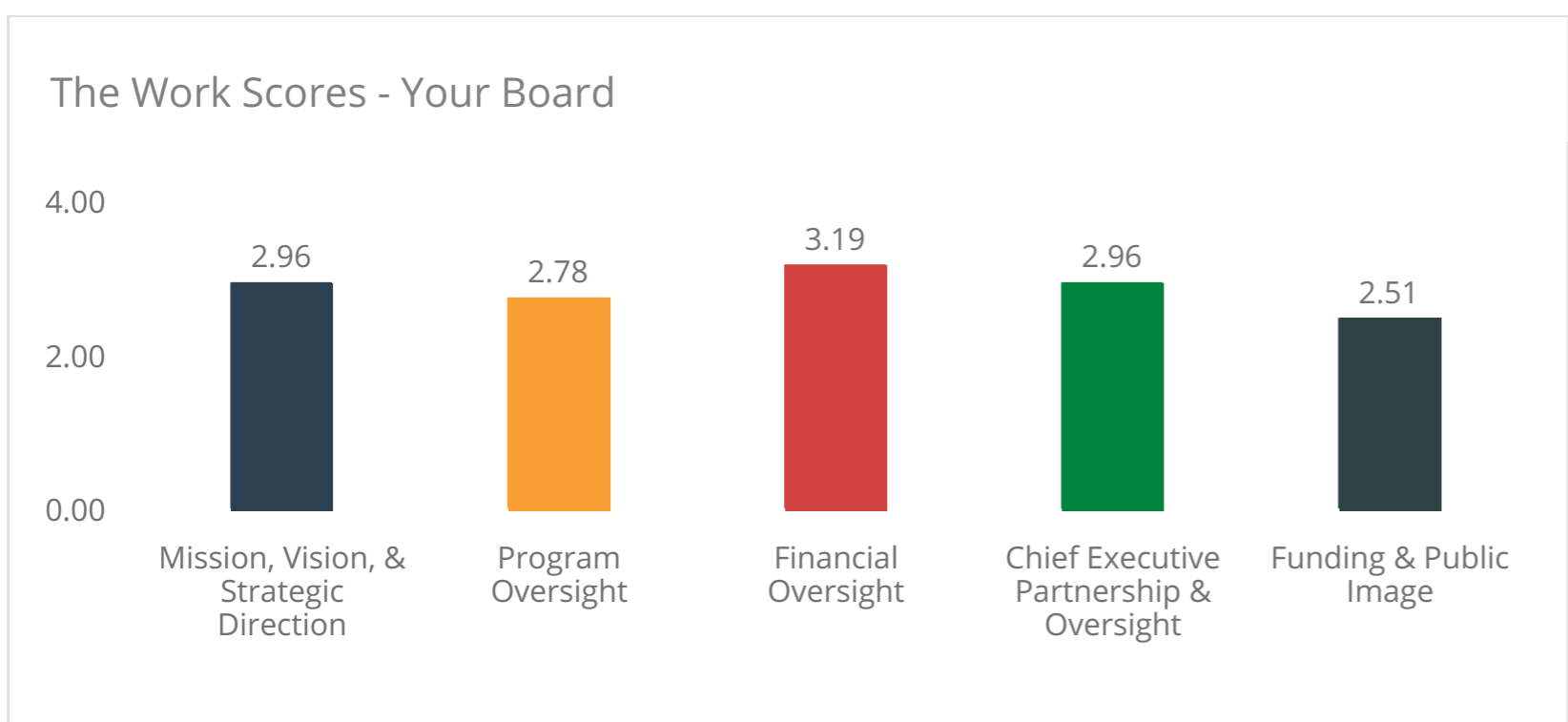
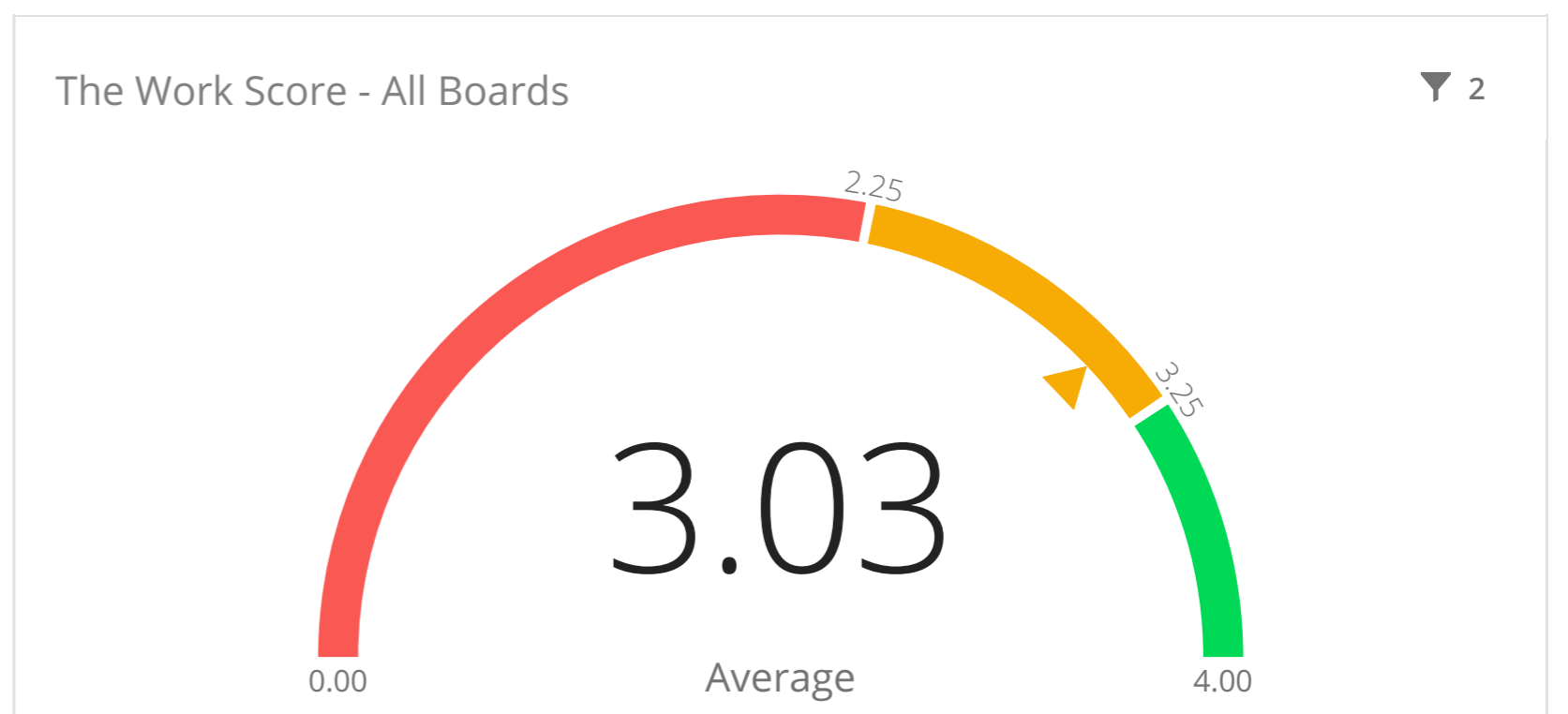
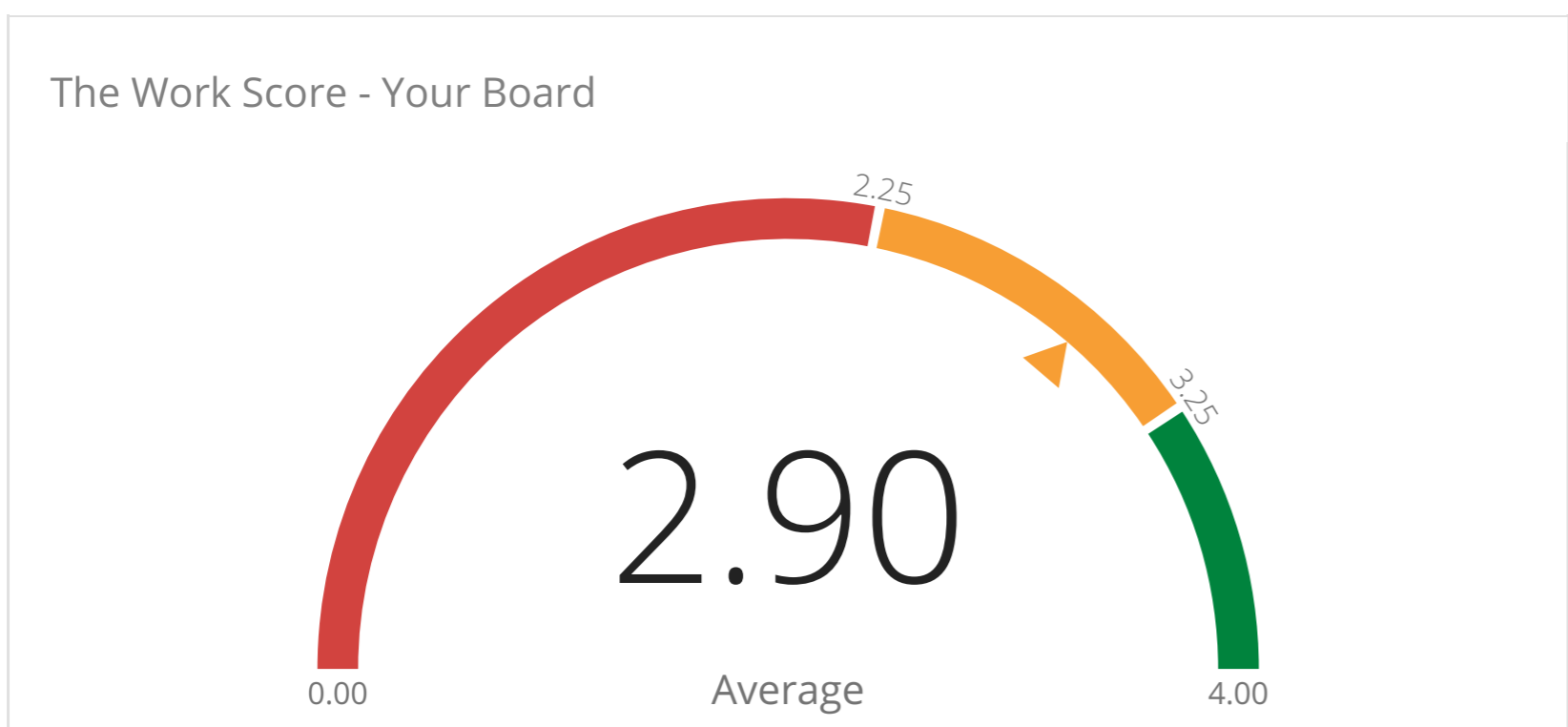
Highest to Lowest Ranked Responsibilities

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.



W | The Work

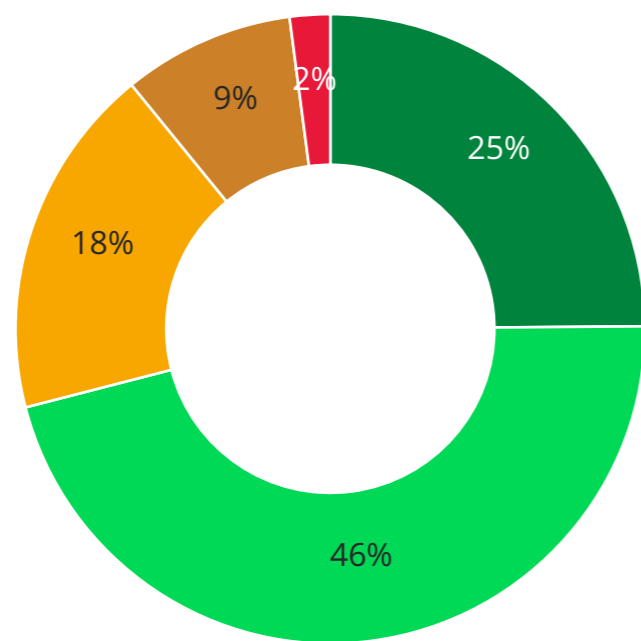
Boards are charged with many important responsibilities both within and outside the boardroom. This section explores board performance in five areas of responsibilities that are categorized as board work: mission, vision, and strategic direction; program oversight; financial oversight; oversight of the chief executive; and funding and public image.



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.

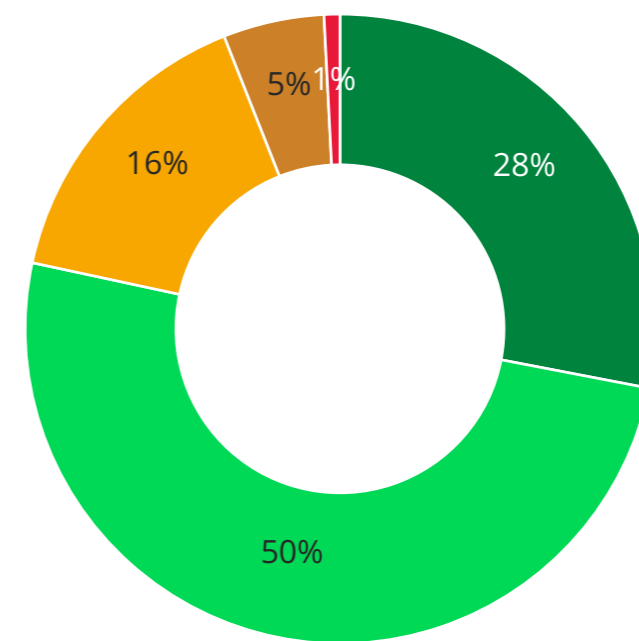
Your Board



● Very Satisfied ● Satisfied ● Neutral ● Dissatisfied ● Very Dissatisfied

All Boards

▼ 2



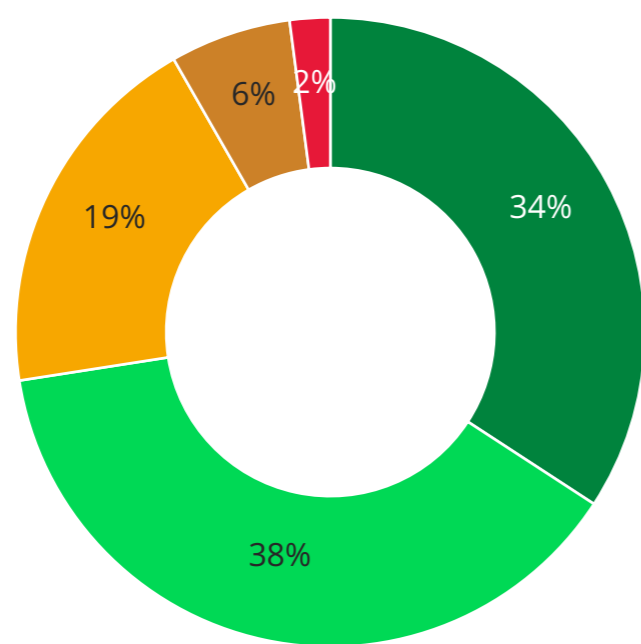
● Very Satisfied ● Satisfied ● Neutral ● Dissatisfied ● Very Dissatisfied

Board Service Experience

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 support the organization, 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.

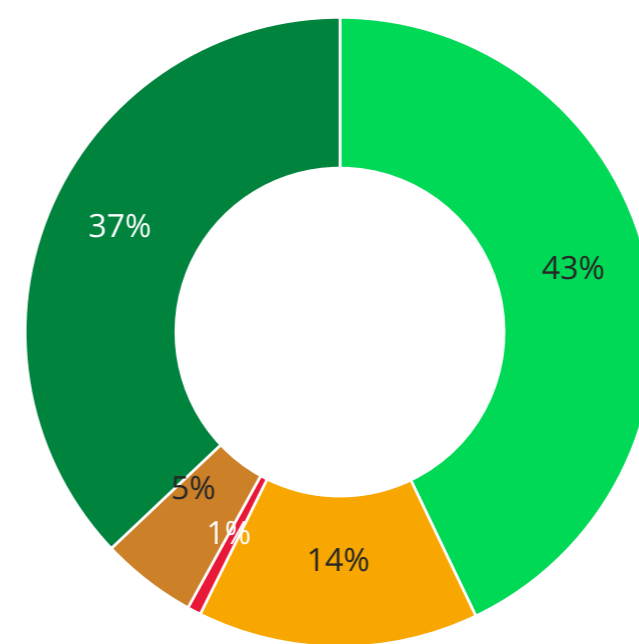
Your Board



● Very Satisfied ● Satisfied ● Neutral ● Dissatisfied ● Very Dissatisfied

All Boards

▼ 2



● Satisfied ● Neutral ● Very Dissatisfied ● Dissatisfied ● Very Satisfied

General Open-Ended Responses

Comments appear exactly as they were entered in the survey.

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

Limited experience/too soon to evaluate

Continued focus on income producing opportunities. More positive interaction with staff--both new and old Although "old-school" more opportunities to interact with staff, to get their opinion about what improvements might be possible.

Fundraising and Use of Board member's time

Organization and structure

Recruitment

1) Strategic Planning 2) Adequate financial resource to deliver on the plan 3) Appropriate staffing to deliver on the plan

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.

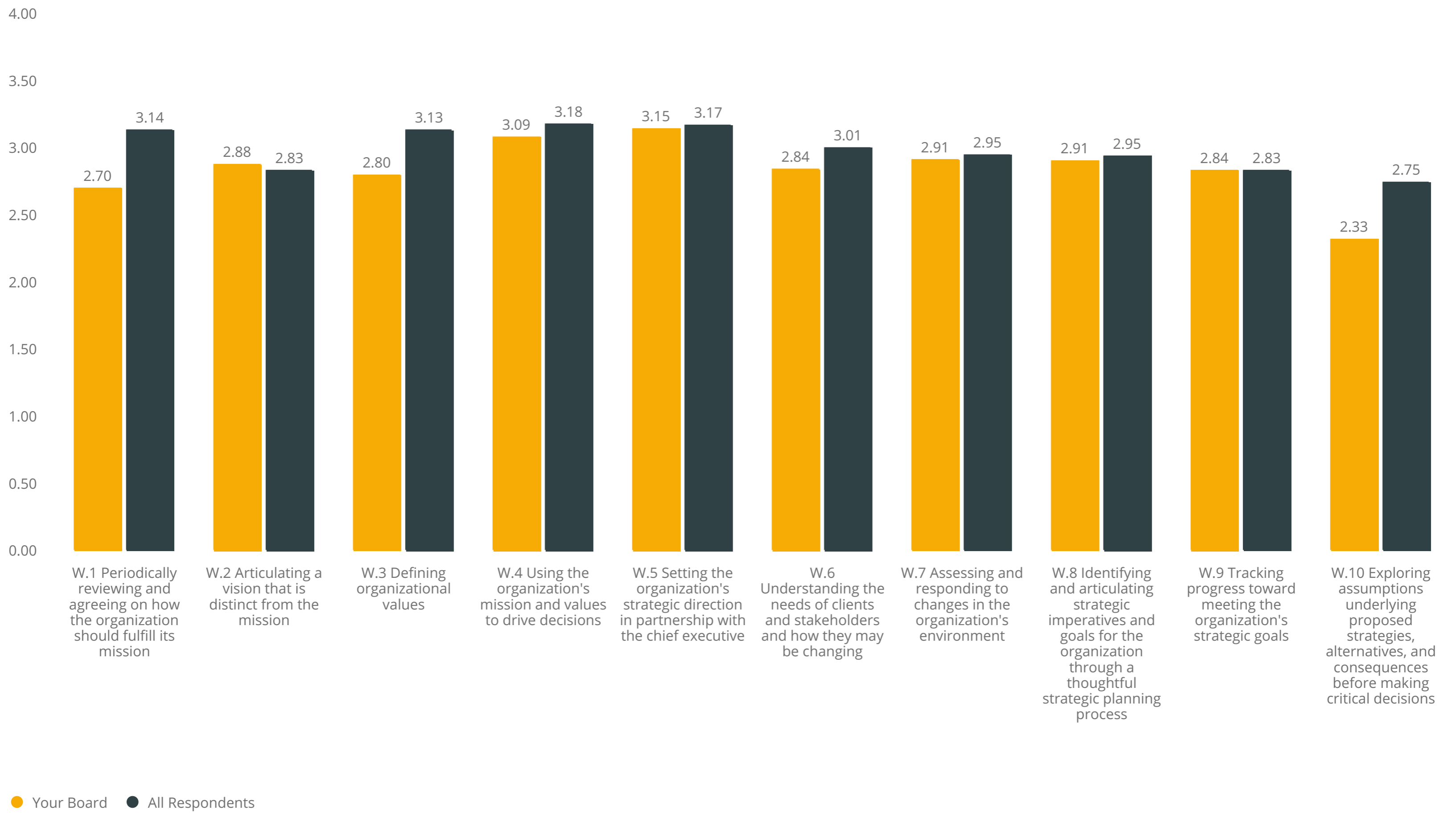
Strengthen Performance through Action

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:)

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

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.



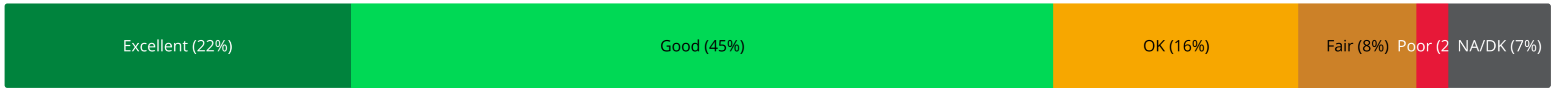
W.4 Using the organization's mission and values to drive decisions.



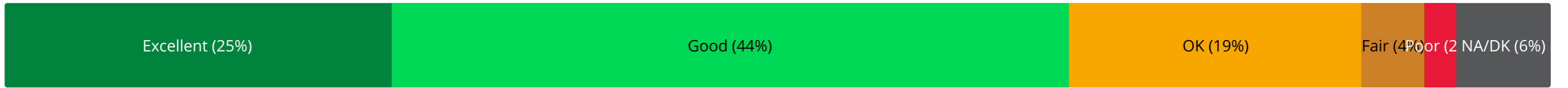
W.5 Setting the organization's strategic direction in partnership with the chief executive.



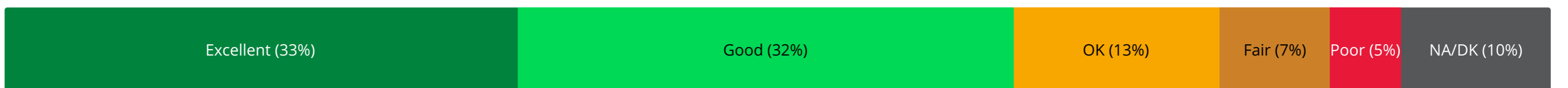
W.6 Understanding the needs of clients and stakeholders and how they may be changing.



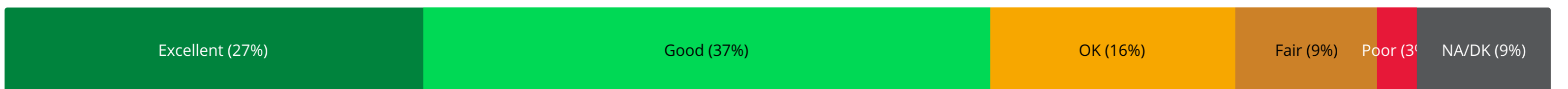
W.7 Assessing and responding to changes in the organization's environment.



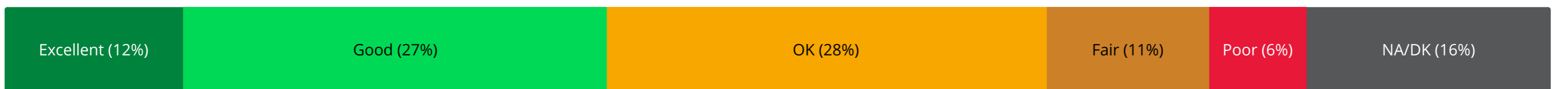
W.8 Identifying and articulating strategic imperatives and goals for the organization through a thoughtful strategic planning process.



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.



How can the board improve its performance in this area?

Be very specific regarding board performance from staff's perspective. Even asking for an evaluation from them regarding board performance.

Redo and revisit strategic planning process.

The Board Retreat could be a space not only for bringing in new members, but also for diving into strategic planning.

I think we do as well as can be expected.

Continuing to work hard & be dedicated.

Already executing a strategic plan.

More training.

See above.

Stay the course! We developed a plan. Let's keep it alive, regenerate as needed, and keep it in front of us.

No more results to show

W | The WORK (Continued)

Financial Oversight | Section Detail

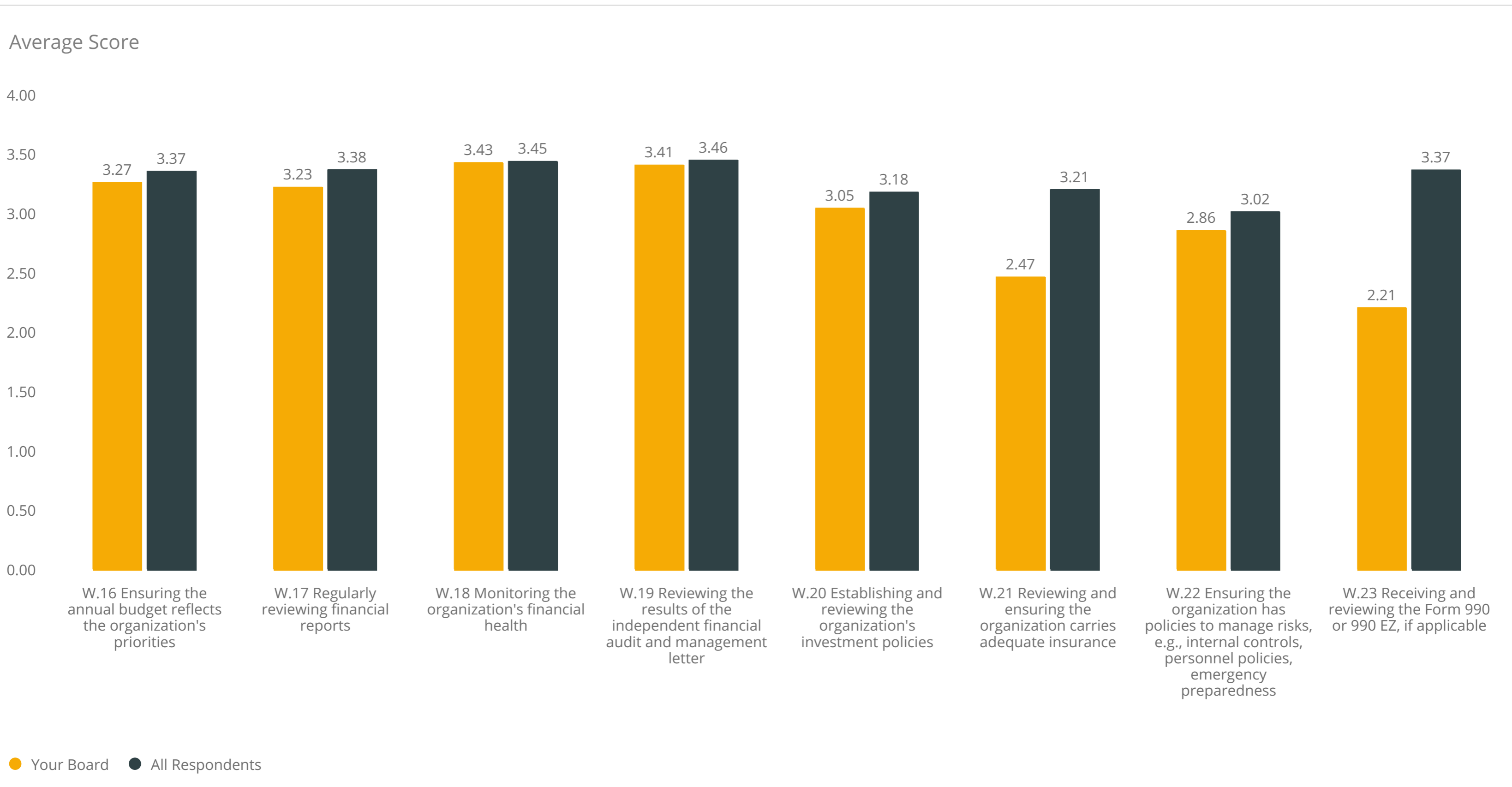
Boards are responsible for ensuring the organization has adequate resources, protecting its assets, and maintaining its legal and ethical integrity. This includes approving the annual budget and then monitoring performance against the budget throughout the year. The board also oversees the annual audit 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.19 Reviewing the results of the independent financial audit and management letter.



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

