



# Results Overview At-A-Glance

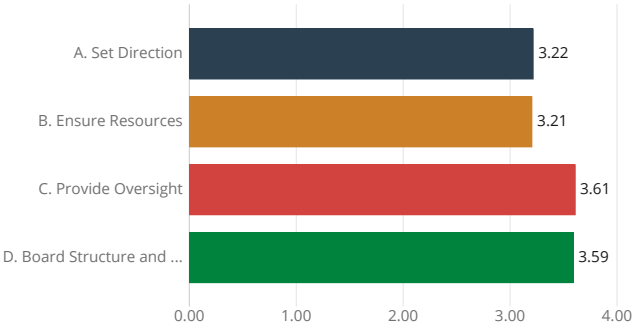
The assessment is divided into four board roles; nine areas of responsibility are incorporated within those roles. The scores for individual questions are averaged within each area of responsibility, and the scores for each responsibility are then averaged within each role. These board roles and responsibilities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

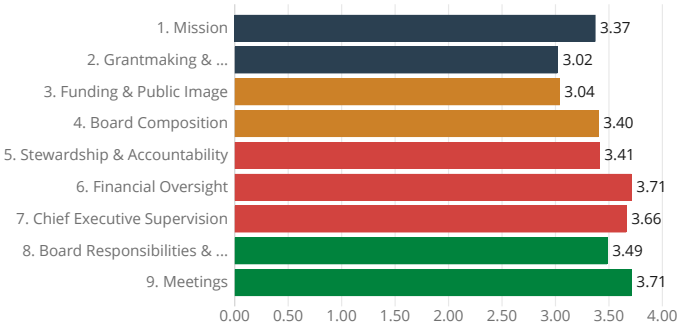
## Roles and Responsibilities Overview

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

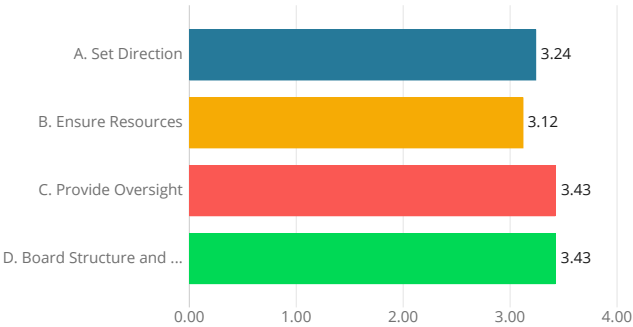


Your Board's Responsibility Scores



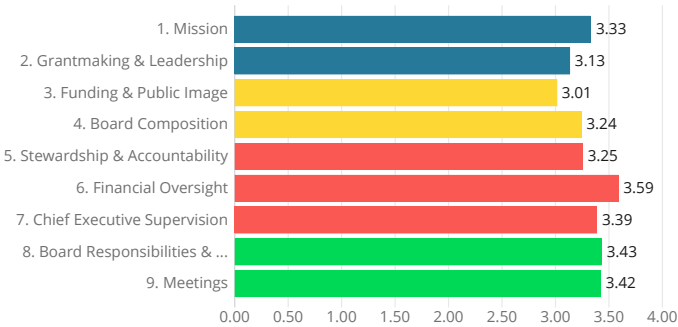
All Boards Average Role Scores

1



All Boards Average Responsibility Scores

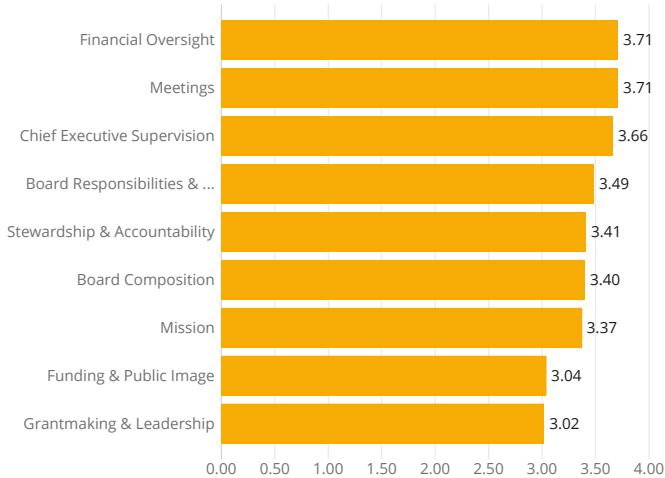
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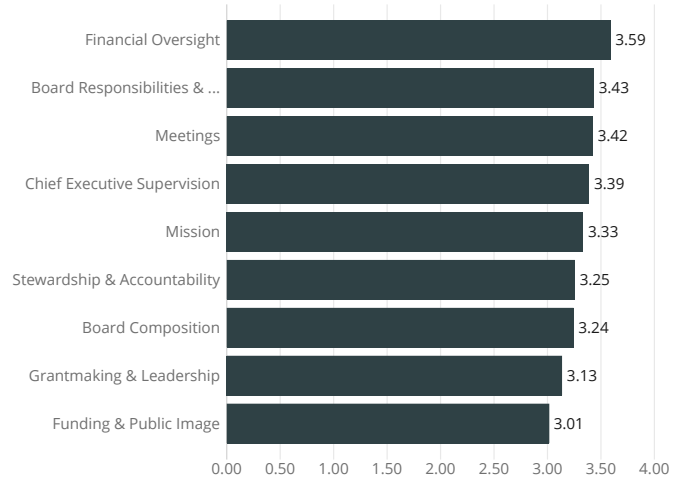
## Highest to Lowest Ranked Responsibilities

The graph below shows how your board has assessed its performance — from highest to lowest — in the nine 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.

Your Board



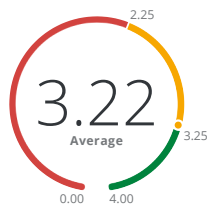
All Boards



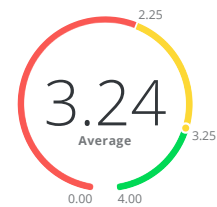
## A | Set Direction

Setting direction requires the board to look beyond the immediate horizon by developing a shared vision, articulating guiding values for organizational action, establishing major goals, and outlining strategies for achieving those goals.

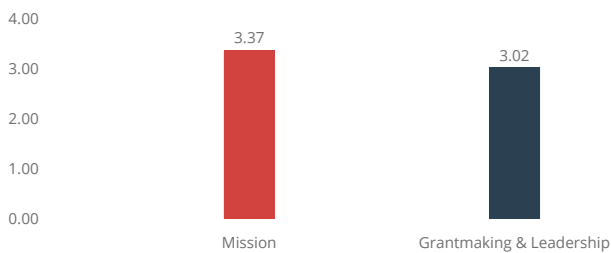
A | Set Direction Role Score - Your Board



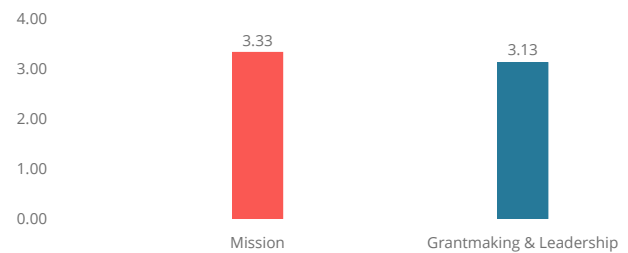
A | Set Direction Role Score - All Boards



A | Set Direction Responsibility Scores - Your Board



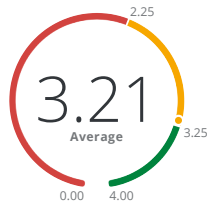
A | Set Direction Responsibility Scores - All Boards



## B | Ensure Resources

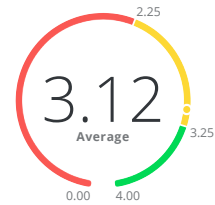
After establishing a strategic direction, the board is responsible for ensuring that the organization has the resources needed to achieve its goals. An organization needs three principal types of resources: people to do the work; money to pay salaries and expenses; and credibility with the public, on whose support it depends. While the board itself does not necessarily have to secure these resources, it makes sure that people and systems are in place to make them available.

B | Ensure Resources Role Score - Your Board

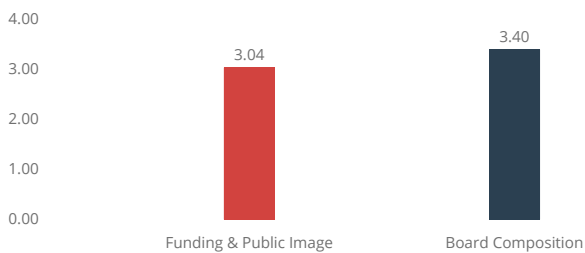


B | Ensure Resources Role Score - All Boards

▼ 1

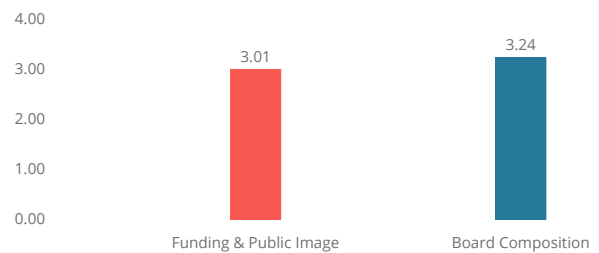


B | Ensure Resources Responsibility Scores - Your Board



B | Ensure Resources Responsibility Scores - All Boards

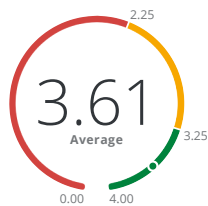
▼ 1



## C | Provide Oversight

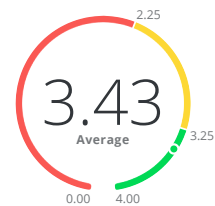
In the board's oversight role, the emphasis is on accountability. As a governing body, the board provides oversight not only of the finances and programs, but also of the community foundation's legal and moral conduct. Furthermore, the board delegates authority to the chief executive, who is therefore accountable to the board. Thus, the board's oversight role also includes supervising, providing feedback to, and supporting its chief executive.

C | Provide Oversight Role Score - Your Board

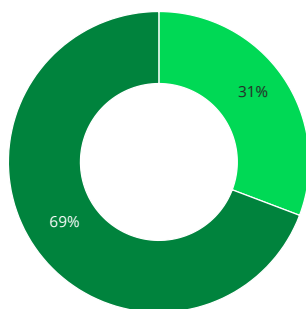


C | Provide Oversight Role Score - All Boards

▼ 1



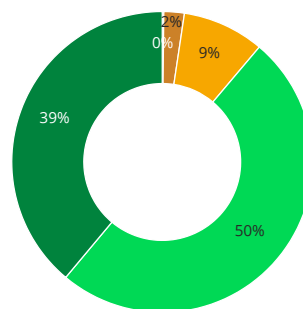
Your Board



● Satisfied ● Very Satisfied

All Boards

▼ 1

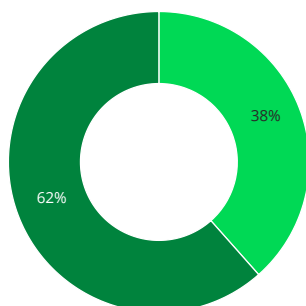


● Very Dissatisfied ● Dissatisfied ● Neutral ● Satisfied ● Very Satisfied

## 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 community foundation 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.

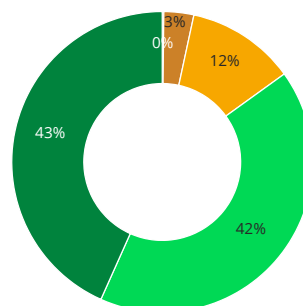
Your Board



● Satisfied ● Very Satisfied

All Boards

▼ 1

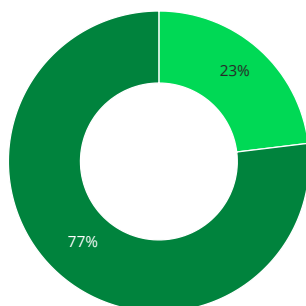


● Very Dissatisfied ● Dissatisfied ● Neutral ● Satisfied ● Very Satisfied

## 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 community foundation.

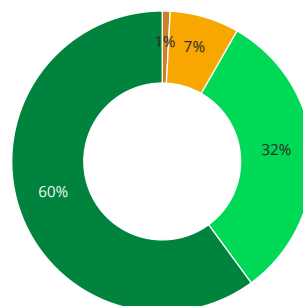
Your Board



● Satisfying ● Very Satisfying

All Boards

▼ 1



● Disappointing ● Neutral ● Satisfying ● Very Satisfying

## 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?

community awareness and raising \$

Representation to reflect diversity in the community Improvement of means to raise annual operating budget (this is still a fairly new organization that broke away from a larger community group and this is being worked on).

Evaluating the fulfillment and impact of grants made development plan for the future Increasing the diversity of the board members

Analyze and verify the board makeup reflects this community, plus contains individuals who benefit the work of the organization's strategic plan. Identify what this community truly needs from the Community Foundation with a specific look towards the future.

Diversity of the Board Complete strategic plan to guide the Board's work Support leadership and professional growth to encourage her long term commitment to her position as of

I'm not sure.

We need a well planned strategy of adding new funds to our overall account base. How many annually and who will be attempting to visit. We need a plan to add new board members that represent the next generation of leaders in our community as well as meet the diverse population base we serve in .

Adding qualified diversity to the board.

Establish annual fundraising goals. Develop a contingency plan. Develop a succession plan.

Make sure all board members are engaged, continue working on board sustainability and diversity (gender, age, ethnicity, geographical).

define mission plan recruitment of more funds even though a good job being done by now continue to recruit outstanding board members

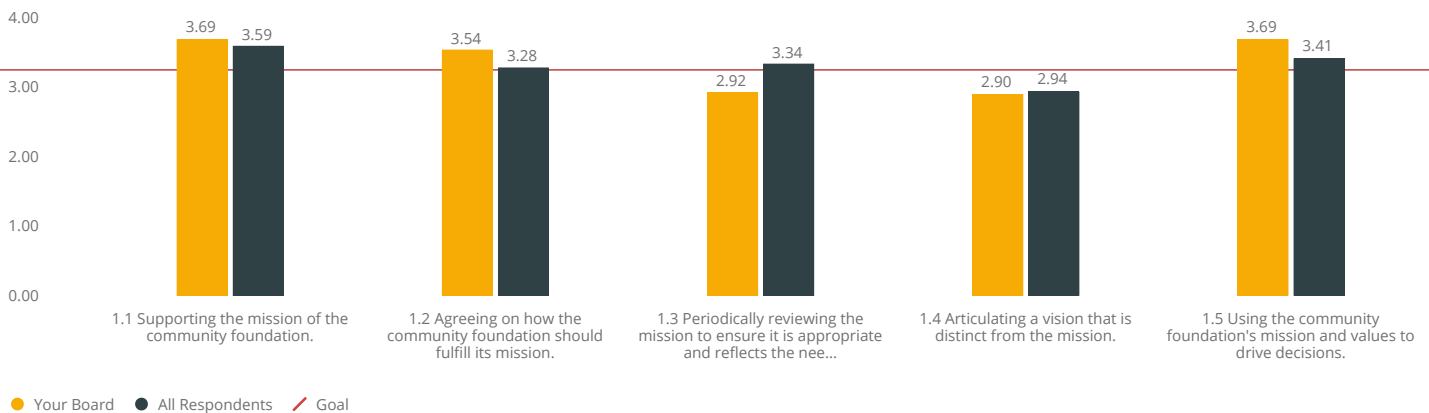
No more results to show

## Mission | Section Detail

One of a community foundation board's fundamental responsibilities is to establish the mission and vision for the future of the community.

- A mission statement defines your foundation'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 foundation is heading. It defines the foundation'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.

Average Score



### Question Breakdowns

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

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

1.1 Supporting the mission of the community foundation.



1.2 Agreeing on how the community foundation should fulfill its mission.



1.3 Periodically reviewing the mission to ensure it is appropriate and reflects the needs of the community.



1.4 Articulating a vision that is distinct from the mission.



1.5 Using the community foundation's mission and values to drive decisions.



How can the board improve its performance in this area?

contribute more time and \$

With the organization being relatively young at the local level, I feel it has some room for work. The organization's board, with the help of its executive director, must ascertain what this community truly needs, primarily as the local area works through the effects of a pandemic. I don't know where this road leads us, but we'll learn more through dialogue with others.

This assessment exercise and follow up Board strategic planning session will help improve in this area

Our foundation is new in its independence from our former partner. These are items that we would and should give focus to now that we are on our own.

I am at a loss for a vision distinct from the mission. As to agreeing how the foundation should fulfill it's mission, I think there was a disconnect in agreement to assume new responsibilities such as funding local businesses.

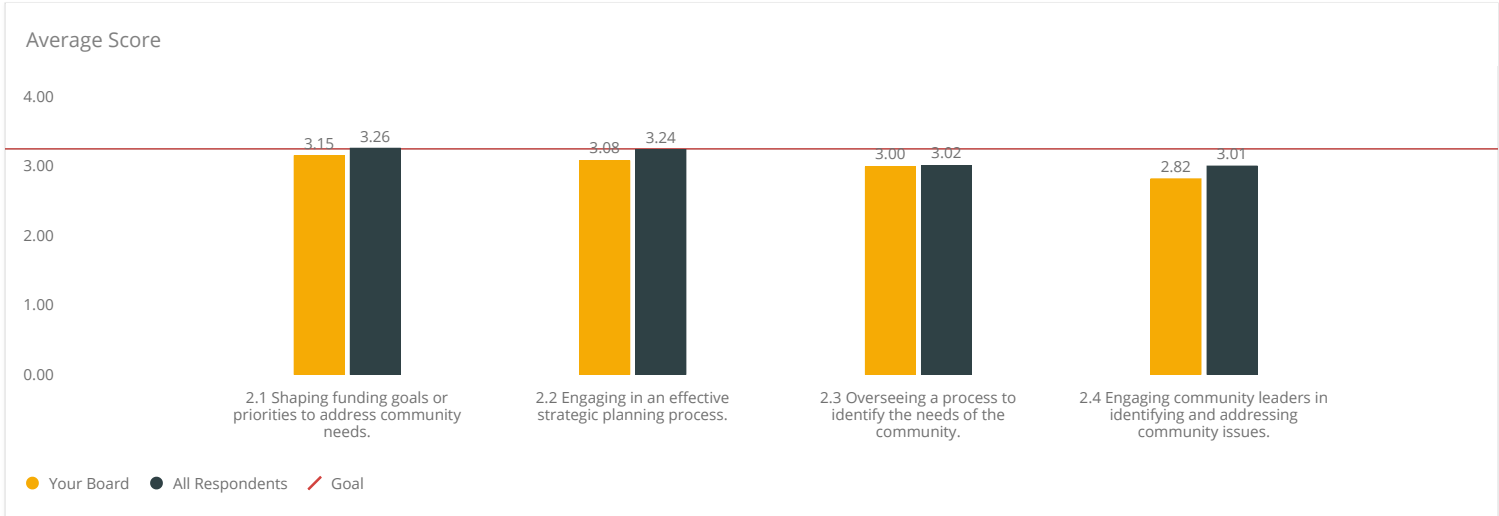
If there are separate vision and mission statements, perhaps they should be revisited.

Plan to work on in 2021

No more results to show

## Grantmaking & Community Leadership | Section Detail

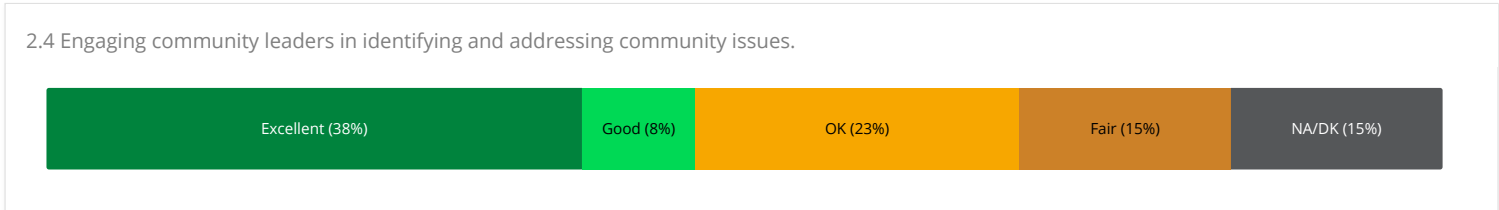
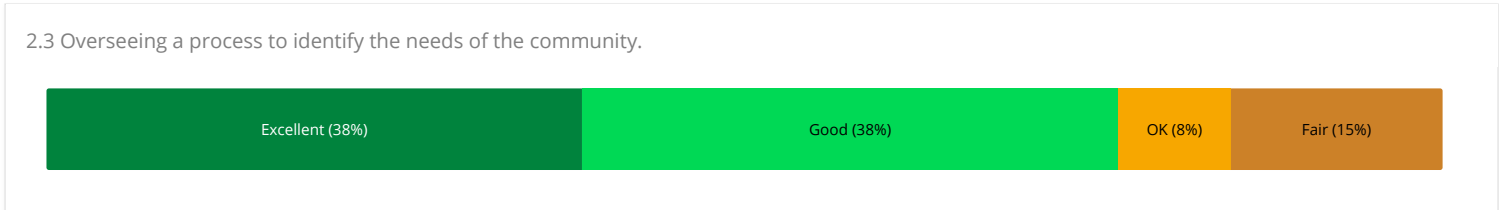
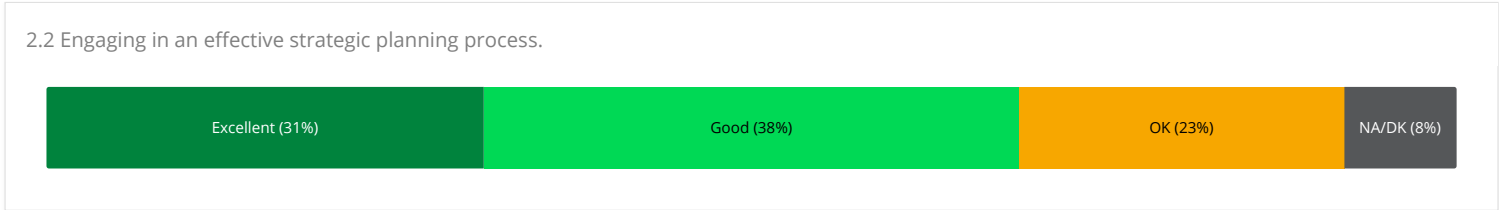
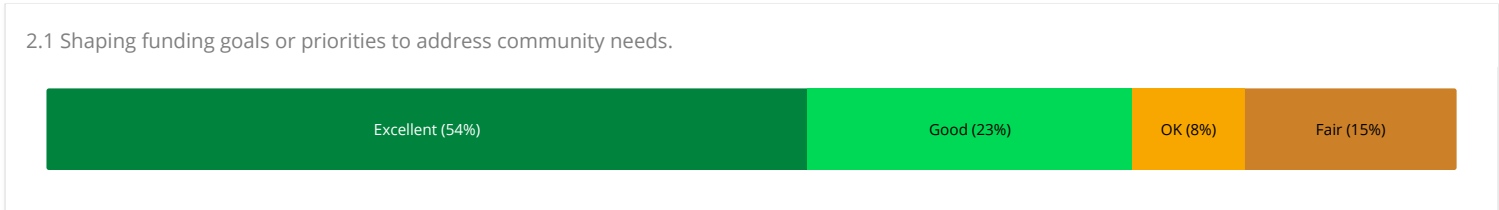
An important role for a nonprofit governing board is to ensure effective planning, and a community foundation board has a particular responsibility to identify emerging issues in the community, set funding goals or priorities accordingly, and determine when or if the foundation should act as a leader and convener. Throughout the grantmaking process, the board seeks to understand the community foundation's donors, as well as the needs of the community, so that it can respond appropriately as opportunities and challenges arise.



### Question Breakdowns

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

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





How can the board improve its performance in this area?

Once all is clear on what this community truly needs, I know the organization's executive director will successfully orchestrate the appropriate strategic plan with the board's help.

Performance in this area should improve as the Foundation solidifies its role as a convener of community leaders. That has not been a role of [redacted] in the past when we were an affiliate of [redacted]

Because grants are primarily donor driven, I don't get a sense that we as a board are identifying and targeting specific community needs.

Continue to participate with community leaders on where the most pressing needs are to support our community. Do we sponsor any events that brings the community leaders together for dialogue?

We need to set funding goals.

A goal of ours for 2021

No more results to show

# B | Ensuring Resources

(includes Funding/Public Image and Board Composition)

Your community foundation, like all nonprofits, requires a competent board, adequate financial resources, and a positive public image to accomplish its mission.

**Build a Competent Board through Action**

- 1. Approach recruitment and board building as an ongoing cycle.
- 2. 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.
- 3. If necessary, enhance the profile of your foundation to make it attractive to strong board candidates.
- 4. Create a solid orientation program for new members no matter how extensive their previous board experience is.

**Strengthen Public Image through Action**

- 1. Spread the word about your foundation's accomplishments and share your pride in the foundation. Be the foundation's advocate and representative 24/7.
- 2. Take on assignments such as joining a board team to meet with an elected official or a funder.
- 3. Transmit feedback from stakeholders to help shape board discussion.
- 4. Articulate the foundation's official positions; be clear about when you are presenting your personal opinions.

**Ensure Sustainability through Action**

- 1. Analyze the current mix of revenue to identify shifts or changes that may impact the overall budget.
- 2. Ensure there is adequate infrastructure and resources — both human and financial — to deliver programs and services.

**Ensure Fundraising Success through Action**

- 1. Commit to become actively involved in fundraising. Either raise the needed funds or ensure that staff is equipped with the necessary skills and expertise to oversee the fundraising effort.
- 2. Draft the necessary policies related to fundraising, such as gift acceptance guidelines and statements addressing each board member's personal responsibility to make a contribution or to participate in fundraising activities.
- 3. Serve as references for potential funders.
- 4. Accompany the chief executive on donor visits, identify potential donors, sign fundraising letters, attend fundraising events, and serve as a fundraising mentor for less experienced board members. Keep in mind that fundraising is always a team effort. Division of duties must be clearly defined.

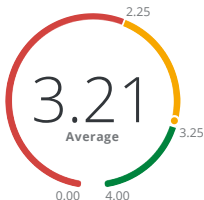
**Recommended Resources - Funding and Public Image**

- Book: [Fundraising Responsibilities of Nonprofit Boards](#)
- Free community resource: [Measuring Fundraising Effectiveness](#)
- Free community resource: [Stand for Your Mission](#)

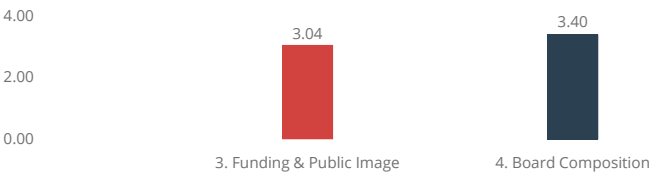
**Recommended Resources - Board Composition**

- 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](#)

Your Ensuring Resources Role Score



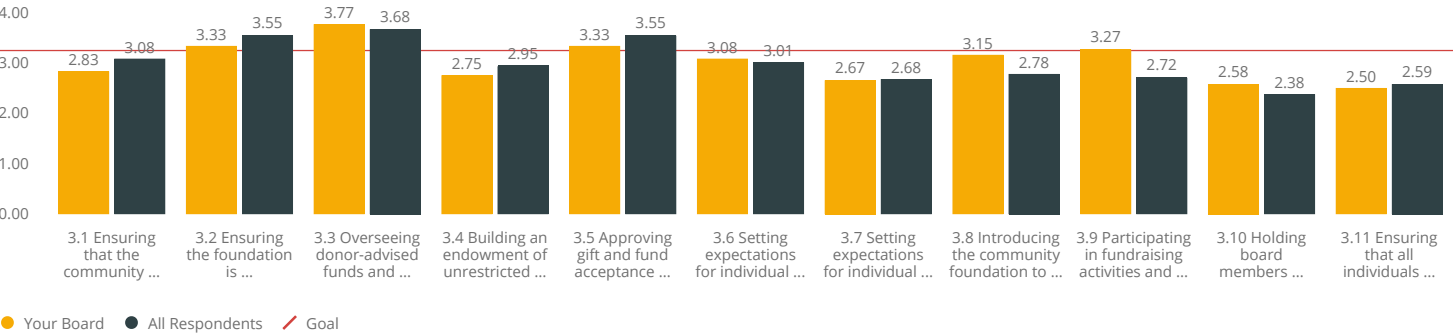
Your role score is based on the following responsibility scores:



# Funding and Public Image | Section Detail

To succeed in its mission of developing the community and cultivating supporters, a community foundation needs to have a strong reputation and an adequate financial base. The foundation needs a clear-cut fundraising strategy to cultivate donors and carry out its grantmaking process. It can serve as a convener within the community as it works to develop broad support in the form of contributions from donors with diverse charitable interests. To accomplish these objectives, the board should be active in making personal contributions, connecting staff to potential donors (individuals, foundations, and corporations), soliciting friends and colleagues, and serving as an ambassador for the foundation in the community.

Average Score



## Question Breakdowns

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



3.1 Ensuring that the community foundation has a resource development plan.



3.2 Ensuring the foundation is transparent and accountable to the community by regularly disseminating information on finances and grant awards.



3.3 Overseeing donor-advised funds and ensuring they are well managed.



3.4 Building an endowment of unrestricted funds for discretionary grantmaking and/or operating expenses.



How can the board improve its performance in this area?

I think all board members understand and help in this area; but with the fundraising world changing, we must educate ourselves more on how the Community Foundation accesses resources and closes the deal.

Develop a fundraising plan to grow the [REDACTED] and [REDACTED]

By far our largest opportunity is to engage board members to help support our [REDACTED] in opening doors to individuals we know in [REDACTED] can establish funds. Focus on a plan to develop these names and assign to board members that can help in delivering our message.

We might need a white paper for number 3.11

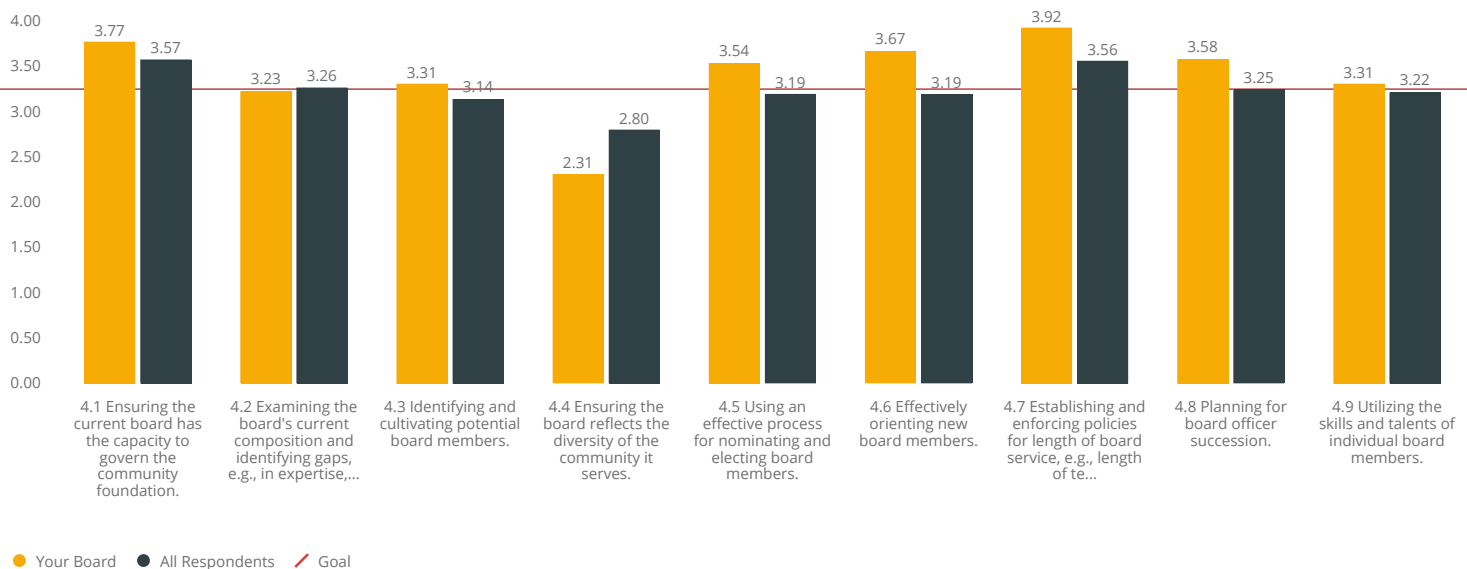
Plans are in place for 2021

No more results to show

## Board Composition | Section Detail

A community foundation's board is responsible for its own composition and leadership. A good board is made up of individuals who contribute critically needed skills, experience, perspective, wisdom, contacts, time, and other resources to the foundation. In addition, the board should reflect the diversity of the community it serves. A well-conceived board-building plan helps the board to identify and recruit members and cultivate officers. New members are oriented to the board's responsibilities and the community foundation's activities. Board member rotation ensures that the board is infused with new ideas yet remains a manageable size.

Average Score

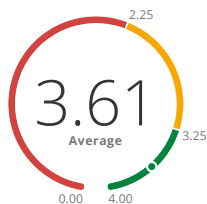


## Question Breakdowns

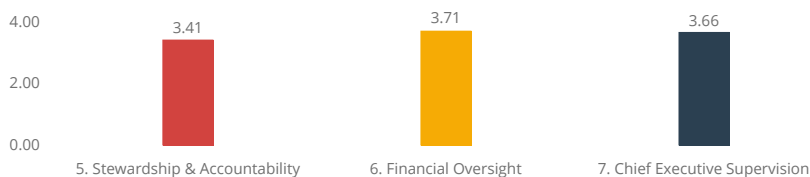
(Please rate the board's performance in...)

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

### Your Providing Oversight Role Score



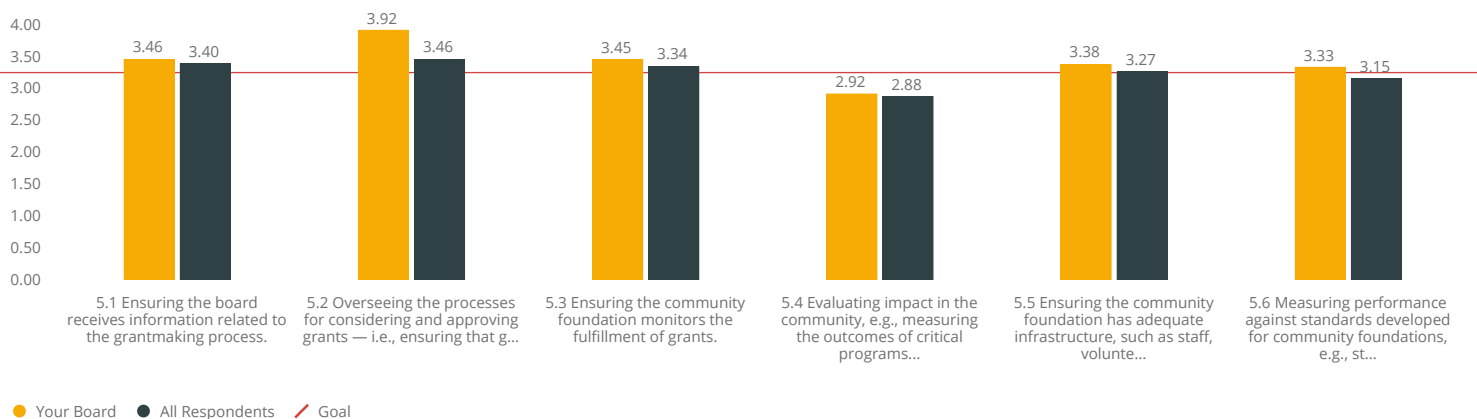
### Your role score is based on the following responsibility scores:



## Stewardship & Accountability Oversight | Section Detail

Each foundation should have a grantmaking strategy describing the foundation's areas of giving and overall involvement, the types of grants the foundation makes, oversight of donor-advised funds, and the foundation's approach to grantmaking and program participation. The foundation's grantmaking strategy provides a long-term, collective framework for giving, which separates "organized philanthropy" from an individual's donations to various worthy causes. Proper care in monitoring all activity helps the foundation to focus on the results it hopes to achieve with all grants, programs, and services, and to determine how to measure the impact of the grants.

### Average Score



### Question Breakdowns

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

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

#### 5.1 Ensuring the board receives information related to the grantmaking process.



#### 5.2 Overseeing the processes for considering and approving grants — i.e., ensuring that grant awards are consistent with donor intent, that grant process guidelines are disseminated widely, and that the grant process is open and competitive.



#### 5.3 Ensuring the community foundation monitors the fulfillment of grants.



# D | Board Structure and Operations

(includes Board Responsibilities & Structure and Meetings)

Every board needs structure — rules, guidelines, and boundaries. A meeting is where the board makes and reviews policy, sets direction for the foundation, defines and follows its own ethical guidelines, oversees the operations, and addresses its own well-being.

## Strengthen Board Structure through Action

1. Periodically assess your board's workload, committee structure, life cycle 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.
3. Define the authority levels on your board. The board functions as a team. Individual board members inherently have no authority — no individual rights — over the foundation but must assume accountability for their own actions.
4. Consider relying on task forces in lieu of multiple standing committees to help the board manage its workload.
5. Cultivate positive board culture and dynamics.

## Strengthen Performance through Productive Meetings

### Set expectations

1. Attendance is an obligation, not an option.
2. Full participation from well-prepared board members is expected.
3. If necessary, draft a code for civil behavior indicating that personal attacks and cacophony are not acceptable; all members are expected to respect their peers' opinions.

### Before the meeting

1. Set the schedule for meetings a year ahead.
2. Draft an agenda that focuses on strategic issues, not on operational matters.
3. Use a consent agenda for standard, no-discussion-needed issues.

### During the meeting

1. Ensure all opinions get aired without bias.
2. Include executive sessions as a standard part of your board meetings.
3. Add meeting evaluation as a standard practice to all meetings.
4. Follow a basic structure for the meeting but allow for free-flowing deliberation on issues.
5. Make sure that those with conflicts of interest recuse themselves from discussing and voting on issues.

### After the meeting

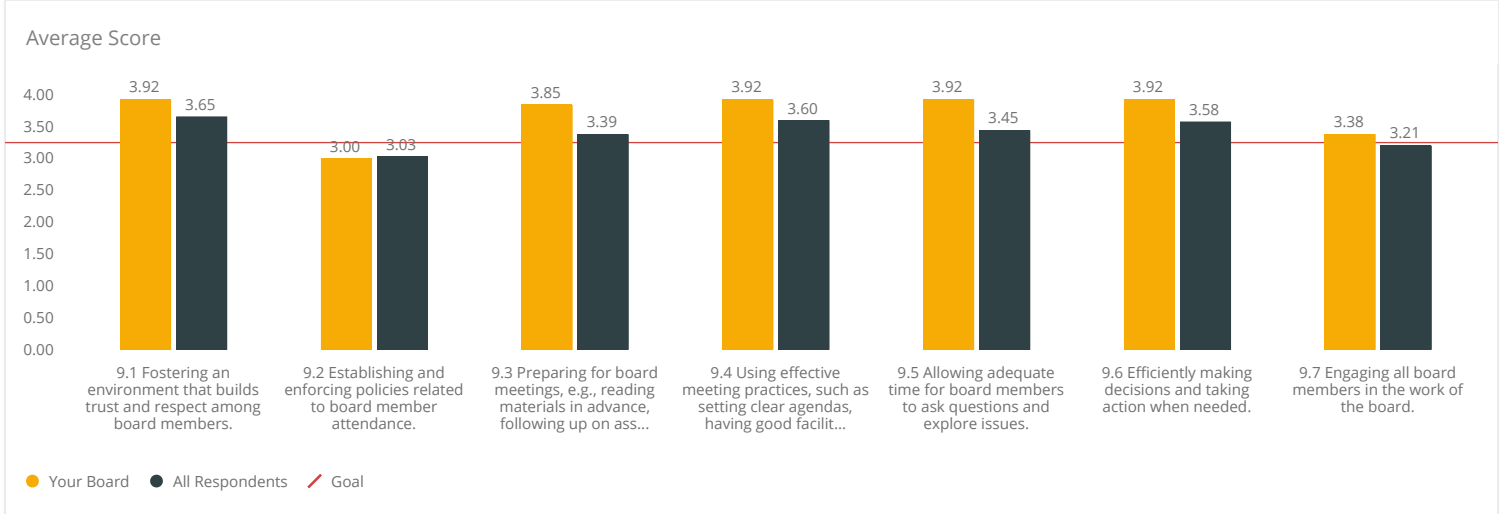
1. Integrate an executive session after each board meeting.
2. E-mail a list of assignments to each board member; copy to the chair.
3. Have the chair or another contact person communicate with board members who did not attend the meeting.
4. Communicate regularly between meetings.

## Recommended Resources - Board Responsibilities & Structure

- Free Community Resource: [Are Your Board Committees Working Well?](#)
- Member Resource: [The Care and Feeding of Your Board: A Checklist for a Top-Level Governance Committee](#)
- Free Community Resource: [Bylaws Dos and Don'ts](#)

## Recommended Resources - Meetings

- Book: [Meeting, and Exceeding Expectations: A Guide to Successful Board Meetings](#)
- Free Community Resource: [Using Generative Governance Principles for Better Boardroom Conversations](#)
- Free Community Resource: [Preparing for More Effective, Focused, and Strategic Board Meetings](#)

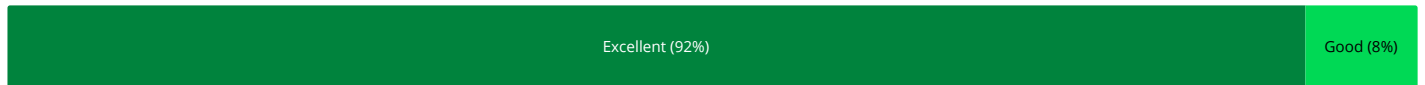


### Question Breakdowns

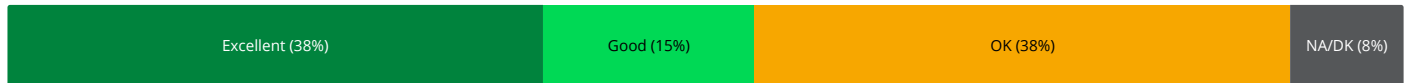
(Please rate the board's performance in...)

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

9.1 Fostering an environment that builds trust and respect among board members.



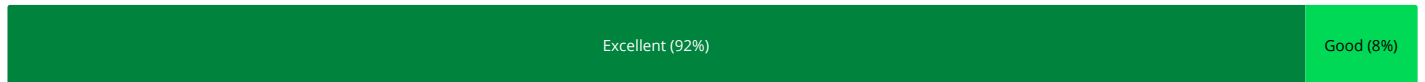
9.2 Establishing and enforcing policies related to board member attendance.



9.3 Preparing for board meetings, e.g., reading materials in advance, following up on assignments.



9.4 Using effective meeting practices, such as setting clear agendas, having good facilitation, and managing time well.



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

