Welcome

Dear Nonprofit Leader,

Congratulations on the completion of your BoardSource Board Self-Assessment. By now, you should have access to the results of your board's most recent assessment. To assist with your review of those results, we have created a benchmarking resource to help you see how others in the sector rated themselves in the key areas of nonprofit governance. This report should serve as a starting point for discussion and reflection about your board's core strengths, as well as areas that may need more attention.

We encourage you to review your results with an open-mind, ask questions, and formalize identified priorities into action plans to guide your board development efforts. BoardSource has a wide range of resources and tools that can support you in those efforts, some of which are highlighted throughout this report. We also encourage you to explore www.boardsource.org to learn more about other ways we can assist your board, whether through our consulting directory, educational programming, or research and leadership on issues of great importance to boards, the social sector, and our society as a whole.

Thank you for the important work that you do, and for trusting BoardSource to be your partner. We applaud you for making this investment in your board's leadership, and look forward to being a continued resource to you as you lead your organization's important mission and work.

Sincerely,



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Results Overview At-A-Glance

Scoring

Scores are based on a 5-point scale using the following definitions:

- 0 = Poor or needs improvement
- 1 = Fair or marginal
- 2 = OK or acceptable
- 3 = Good or above average
- 4 = Excellent or superior

Benchmarking

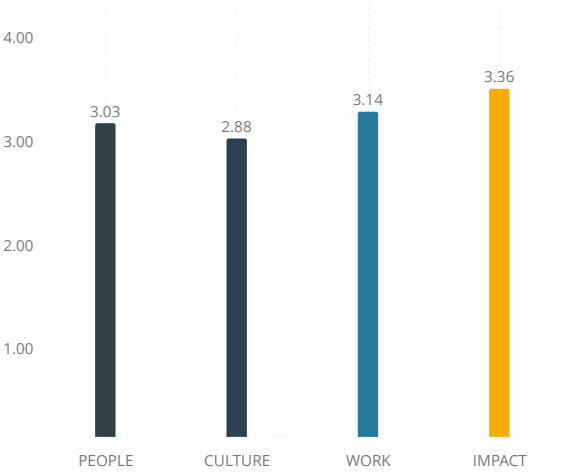
By comparing your performance as a governing body against that of your peers, you will be able to identify how your performance differs. Please use the benchmarking data as one point of reference within the context and history of your organization to help you focus on your strengths and consider potential areas for growth. It is important to note that our benchmarking offering does not necessarily reflect "best practices" that boards are recommended to follow, but rather is simply a jumping-off point, to be able to start a meaningful conversation with your board about where they stand on their work.

Our report provides data collected from other nonprofit organizations that have answered the same questions in BoardSource's Board Self-Assessment (BSA) surveys since 2013. We revised our survey in 2018, therefore the audience size and makeup you are benchmarked against in this report may vary question by question. BoardSource endeavors to benchmark each question by the largest possible audience for maximum data integrity.

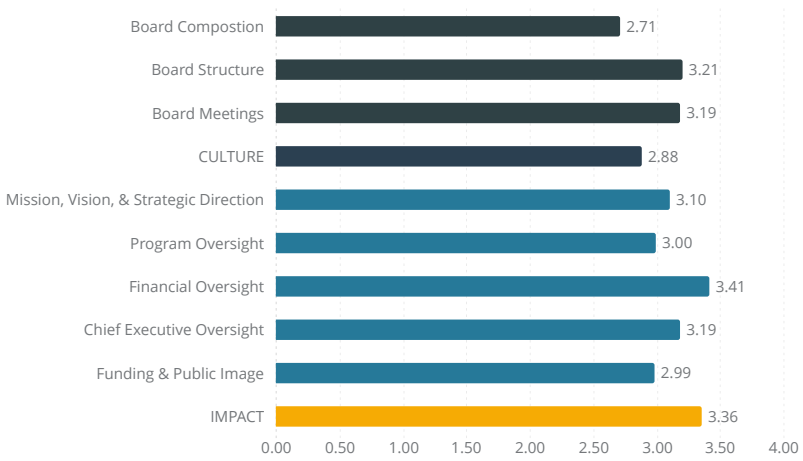
Results Overview

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

All Boards Average Scores



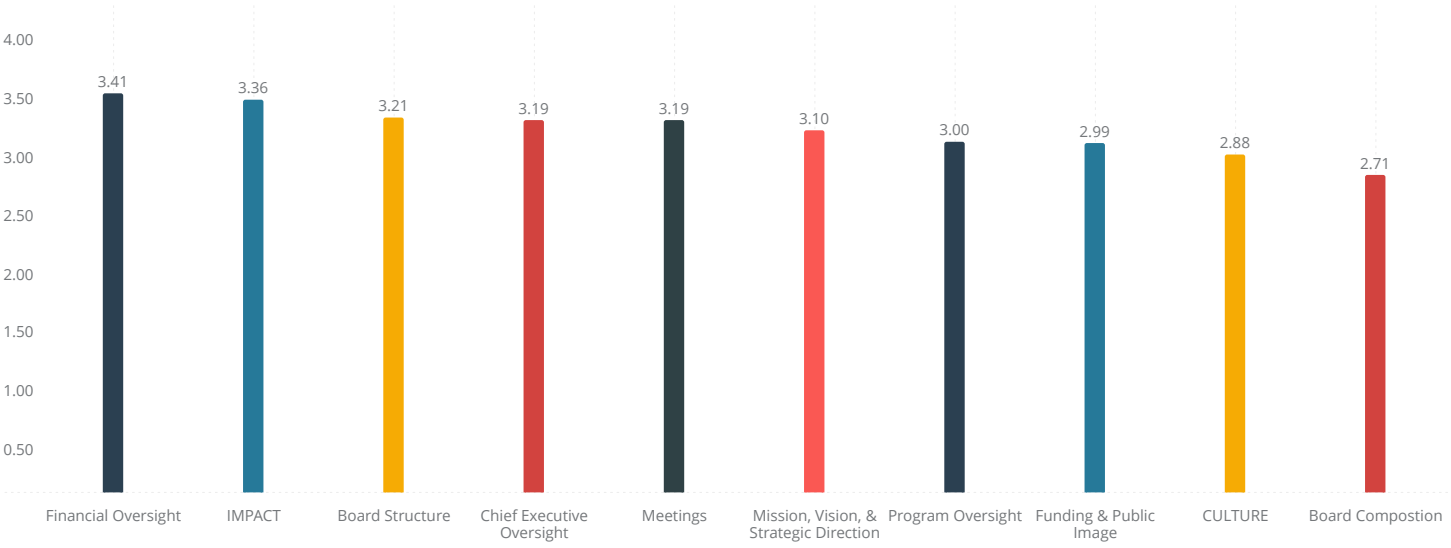
All Boards Average Scores



Highest to Lowest Ranked Responsibilities

The graph below shows how boards have assessed their 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.

All Boards



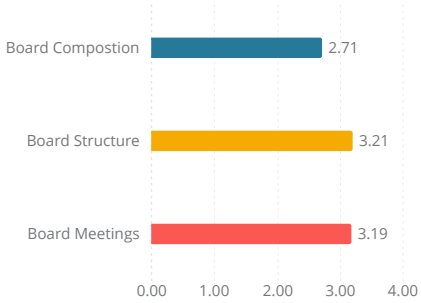
Results Breakdown by Section

The graphs below provide the results breakdown for each section within the survey.

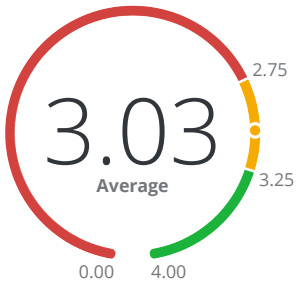
P | The People

Having the right people on the board makes higher performance — in both the board's internal and external functions — more likely. This section assesses the overall balance of who serves on the board (board composition), how people are organized (board structure), and how they deliberate together (board meetings).

The People Scores - All Boards



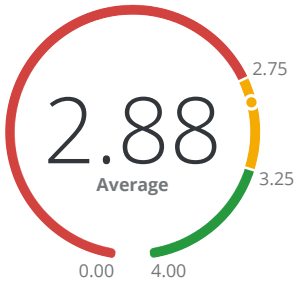
People Score - All Boards



C | The Culture

How the board conducts its work — from group dynamics to its relationship with the chief executive — can help or hinder the board's ability to carry out its work. This section explores the board's performance in creating conditions for the healthy functioning of the board as a collective leadership body.

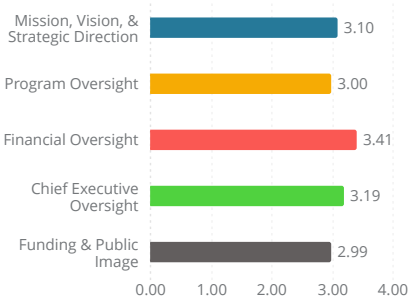
The Culture Score - All Boards



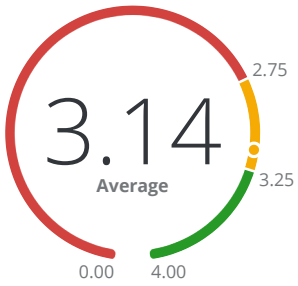
W | The Work

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.

The Work Scores - All Boards



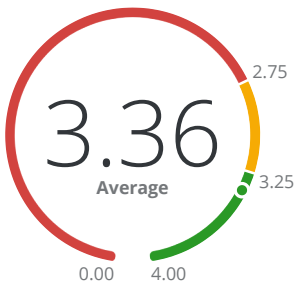
The Work Score - All Boards



I | The Impact

This section explores the board's perception of its impact on organizational performance. The questions reflected here assess the board's connection to the organization's strategy, reputation, and overall effectiveness.

The Impact Score - All Boards



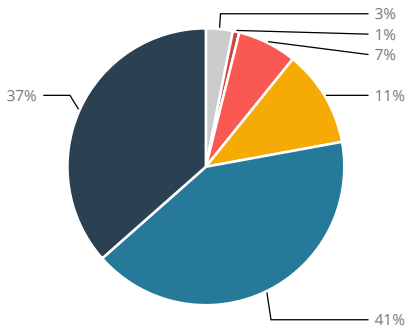
Results for Board Service Related Questions

The charts below reflect scores from questions in the general questions section (specifically Q's G.4 through G.7).

Leadership Resilience

Hypothetically, if your chief executive were to suddenly leave his or her post, how confident are you that your board understands the organization well enough to make informed decisions about how the organization should be led (not just in terms of who the leader should be, but what the new leader will confront)?

All Boards

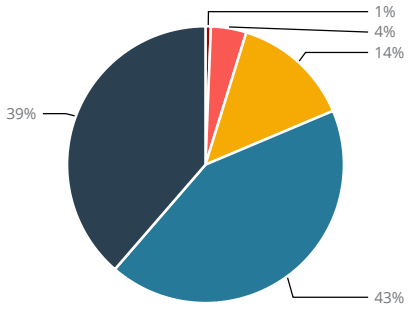


Don't Know/No Opinion · No Confidence · Low Confidence · Neutral · Confident · Very Confident

Level of Commitment and Involvement

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.

All Boards

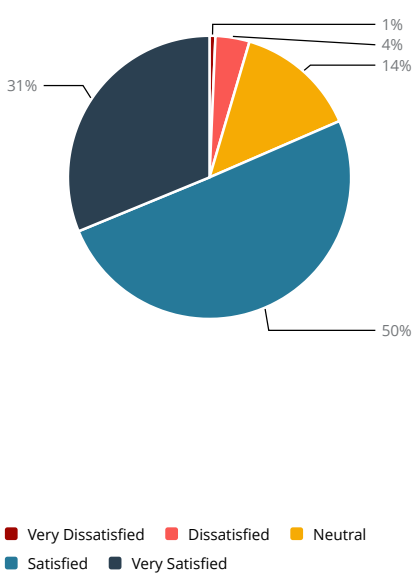


Very Dissatisfied · Dissatisfied · Neutral · Satisfied · Very Satisfied

Overall Effectiveness as a Leadership Body

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.

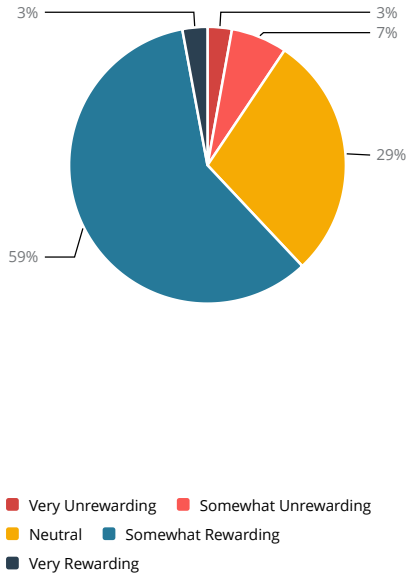
All Boards



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.

All Boards



P | The PEOPLE

Having the right people on the board makes higher performance — in both the board's internal and external functions — more likely. The most successful boards are thoughtfully composed as it relates to skillsets, leadership styles, and diversity of thought and background. This section of the report explores who serves on your board, how it is organized as a collective body, and how it structures and conducts its board meetings.

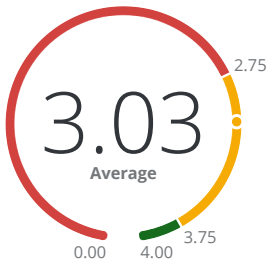
Responsibilities within this section include:

Board Composition: *People are the lifeblood of any organization, and — for a nonprofit organization — that includes the board of directors, which is responsible for its own composition and leadership. A good board is composed of individuals who contribute critically needed skills, experience, perspective, wisdom, contacts, time, and other resources to the organization. A well-conceived board-building plan helps the board to identify, recruit members and cultivate officers. New members are oriented to contribute and understand the board's responsibilities and the organization's core activities. Board member rotation ensures that the board is infused with new ideas yet remains a manageable size*

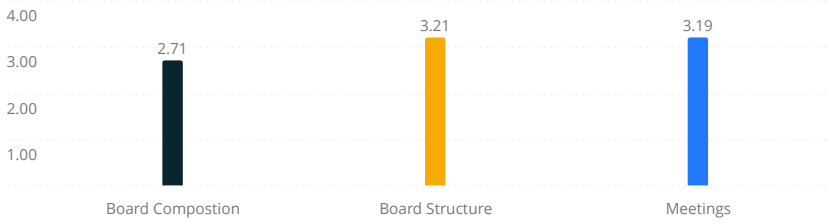
Board Structure: *The board is responsible for making sure its own practices are appropriate and up-to-date. Every board needs structure — rules, guidelines, and boundaries — and should operate in accordance with the structure provided by the organization's bylaws, policies, and procedures. It is also important for the board to periodically review and revise the bylaws, policies, and procedures as necessary. Finally, the board should be strategic about its use of committees and task forces, ensuring that each has a written charter and capable leadership.*

Board Meetings: *Meetings are when boards exercise their governance authority. Because board meeting time is a precious and limited resource, board members must make board meeting attendance a priority and structure their meetings in an efficient and effective manner. Without concerted efforts, it is easy to waste time and resources, dampen members' enthusiasm and interest, and meet without demonstrable results. Board members who prepare for and attend meeting are able to participate in educated and independent decision-making. Meetings need to be managed. A well-designed agenda helps the board chair guide the discussion and keep all members focused on the work at hand. Board members lose interest if they are not challenged and able to utilize their special skills. Listening to repetitive reports is not a constructive use of limited meeting time. Make sure that the majority of your board's meeting time is spent on future issues. By planning ahead and focusing on activities before, during, and after the meeting, you move closer to efficient meeting procedures and outcomes that meet the expectations.*

The People Overall Average



Your board's average score for responsibilities held within The People section:



Board Composition | Section Detail

Scores are based on a 5-point scale using the following definitions:

0 = Poor or needs improvement | 1 = Fair or marginal | 2 = OK or acceptable | 3 = Good or above average | 4 = Excellent or superior

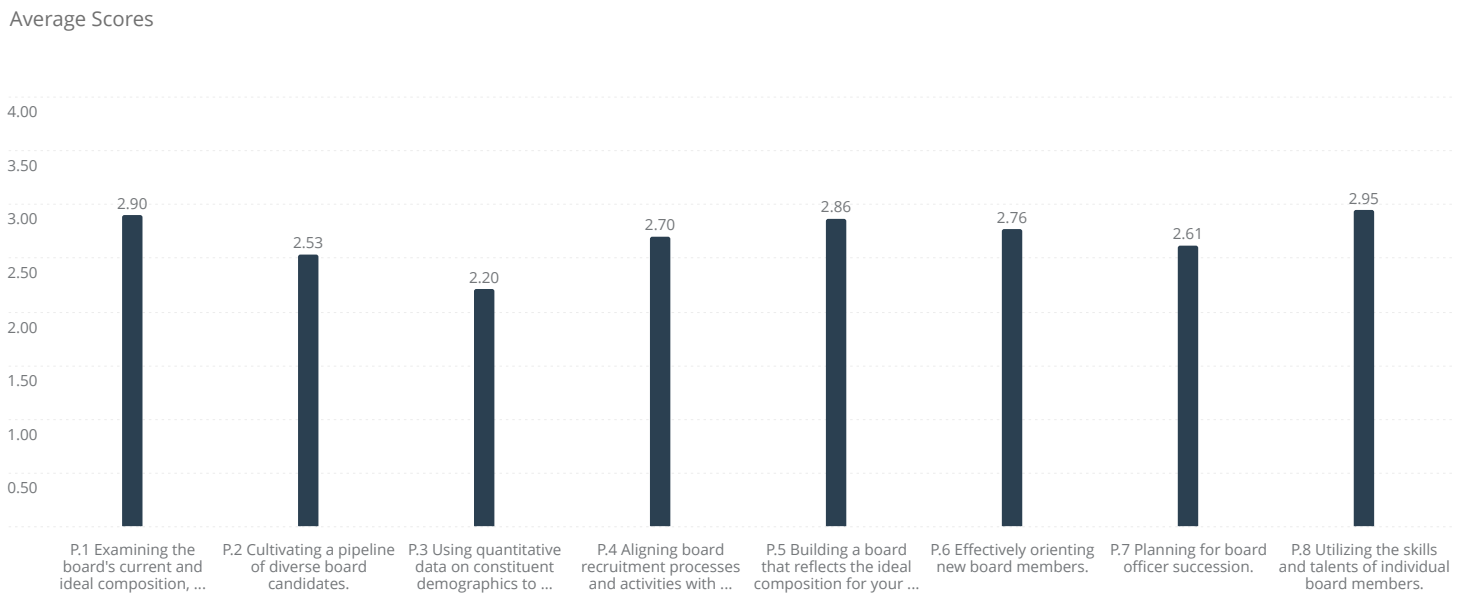
Responses of NA/Don't Know are excluded from analysis

Ways to Strengthen Performance Through Action

- Approach recruitment and board building as an ongoing and strategic cycle.
- If necessary, enhance the profile of your organization to make it attractive to strong board candidates.
- Create a solid orientation program for new members no matter the extent of their previous board experience.
- If you have one, 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.

BoardSource Resources on Board Composition:

- Book: *The Board Building Cycle*
- Free Community Resource: Taking Action on Board Diversity: Five Questions to Get You Started
- Member-Only Resource: Recruiting the Right Board Members

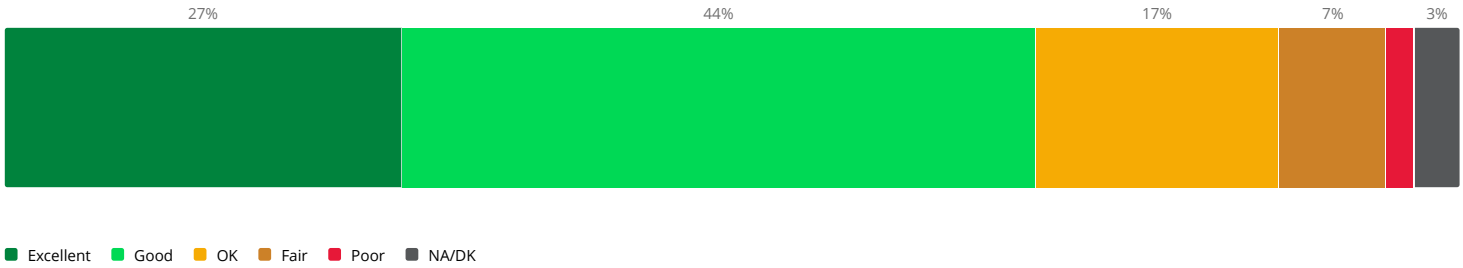


Scoring Breakdown

Breakdown bars below will show the % a scoring option is chosen. Use the legend below or beneath each breakdown chart to identify the individual scoring options.



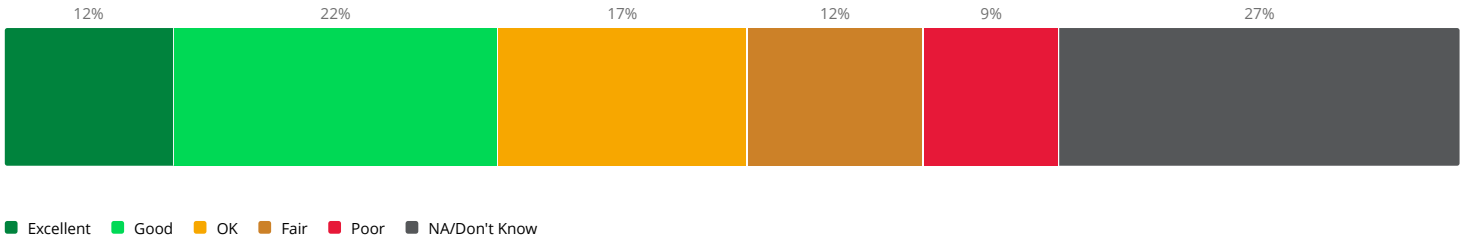
P.1 Examining the board's current and ideal composition, including demographic diversity, to ensure that the board has the perspective it needs.



P.2 Cultivating a pipeline of diverse board candidates.



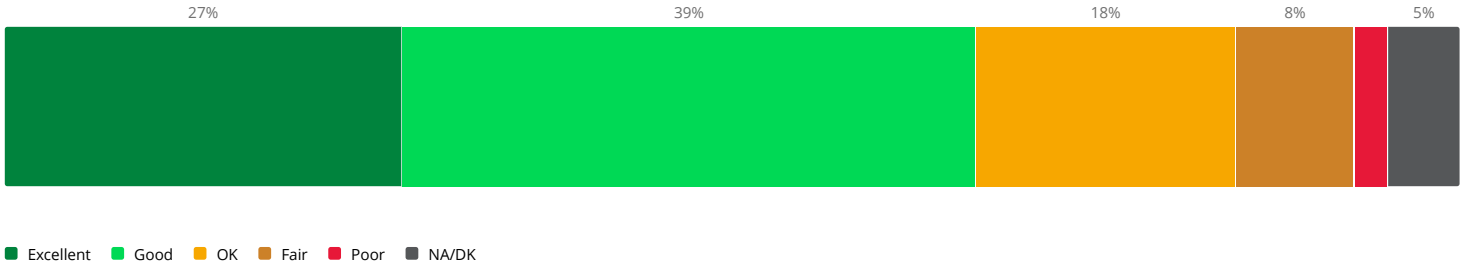
P.3 Using quantitative data on constituent demographics to define what the ideal board composition looks like, including projections on anticipated changes.



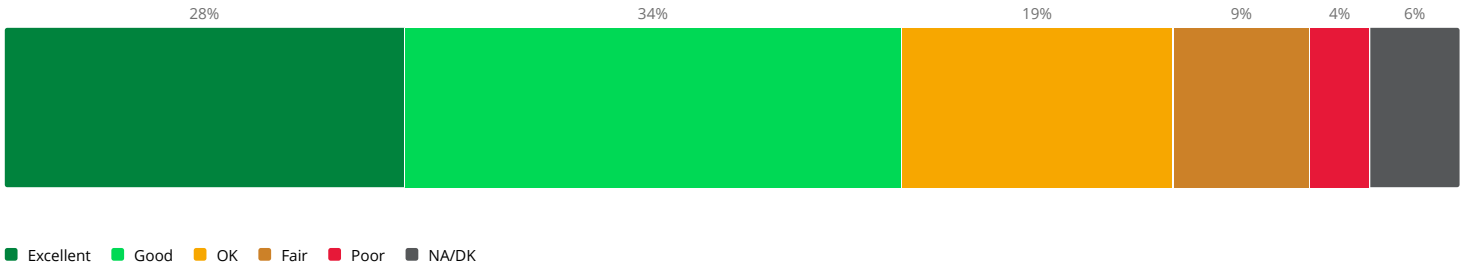
P.4 Aligning board recruitment processes and activities with stated goals for board composition.



P.5 Building a board that reflects the ideal composition for your organization's mission and work.



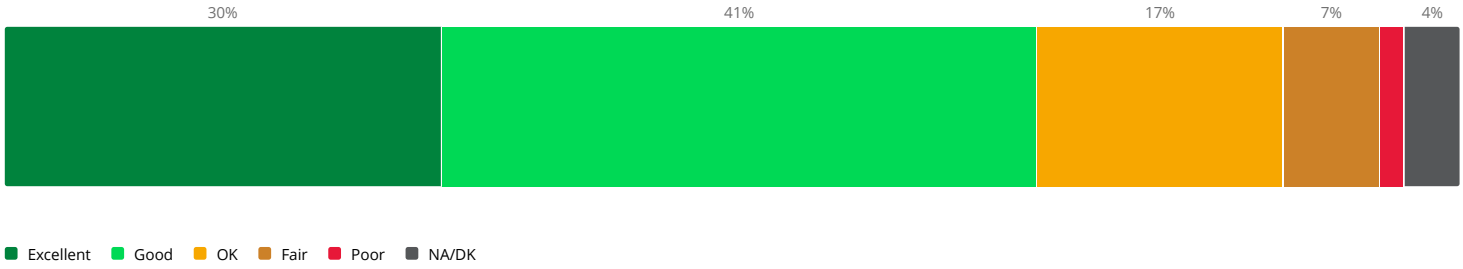
P.6 Effectively orienting new board members.



P.7 Planning for board officer succession.



P.8.Utilizing the skills and talents of individual board members.



Board Structure, Duties, & Expectations | Section Detail

***Size Matters**: The primary guide for determining board size is the board's function, which may change over time depending on organizational lifecycle, board responsibilities, committee structure, legal mandates, need for diversity, and maintaining a manageable group. Variables such as these make it impossible to recommend a standard size for all boards; however it is difficult to imagine that a board with fewer than five members is able to incorporate all the desired qualities and capacity of an effective board, or that an exceptionally large board is able to engage every member in a constructive manner. Regardless of size, all board members must be engaged, as all are equally accountable for the organization.*

***Committees:** Committees can be a practical way to structure and manage the board's work. Standing committee structure can be lean, strategic, and complemented by the use of task forces. Only ongoing board activities really need a standing committee. Otherwise, time-limited task forces are efficient and utilize board members' time, interest, and expertise in a meaningful manner. Committees and task forces are more effective when their charter and scope of work are clearly defined by the board.*

Scores are based on a 5-point scale using the following definitions:

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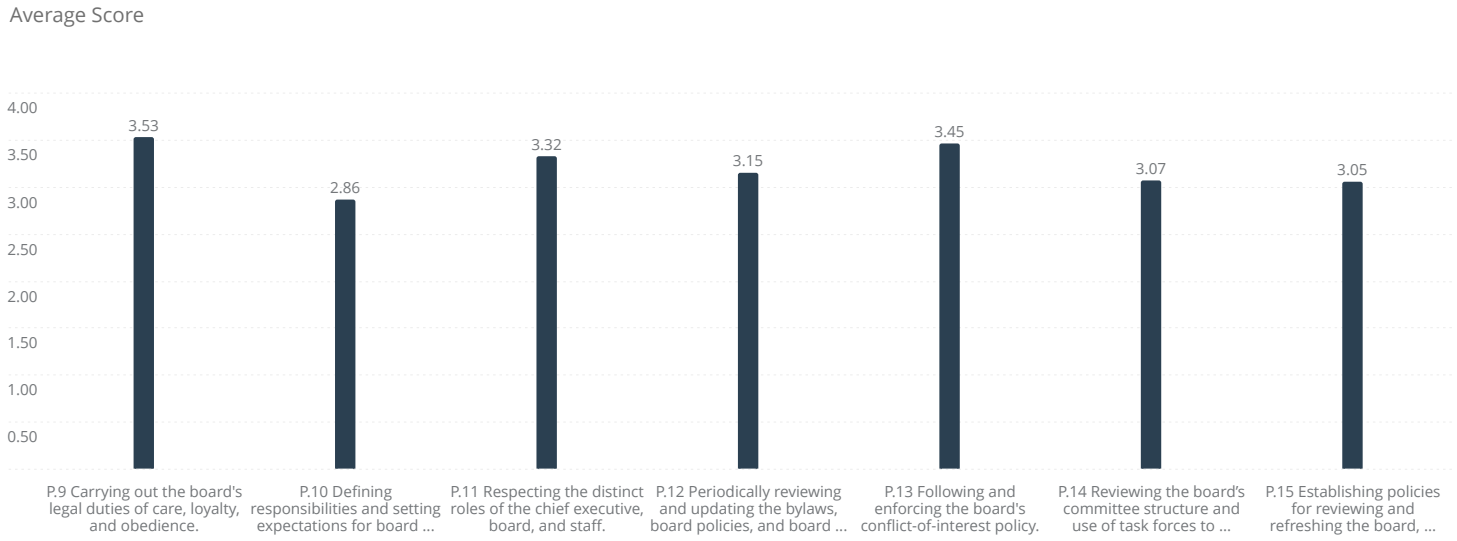
Responses of NA/Don't Know are excluded from analysis

Ways to Strengthen Performance Through Action

- Periodically assess your board's workload, committee structure, lifecycle requirements, need for diversity, and legal mandates to ensure that your board is managed well.
- View your bylaws and policies as evolving documents needing regular review; ensure timely amendments when necessary.
- Consider using time-limited task forces in lieu of standing committees for those activities that are not ongoing.

BoardSource Resources on Board Structure, Duties, & Expectations:

- Free Community Resource: Board Committee Membership: Who Should Serve on Which Committee?
- Members-Only Resource: Board Development Plan
- Free Community Resource: Bylaws Dos and Don'ts



Scoring Breakdown

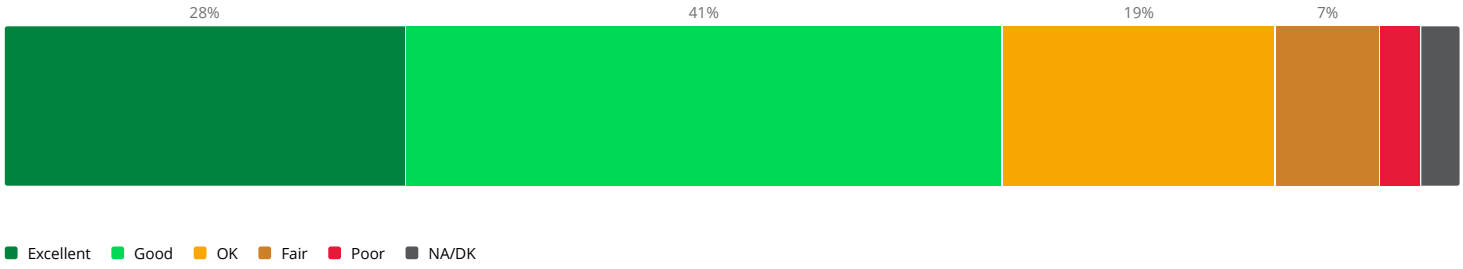
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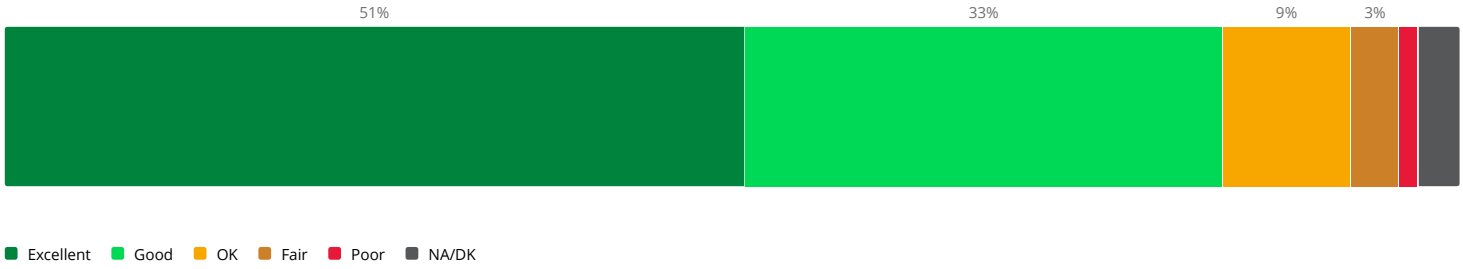
P.9 Carrying out the board's legal duties of care, loyalty, and obedience.



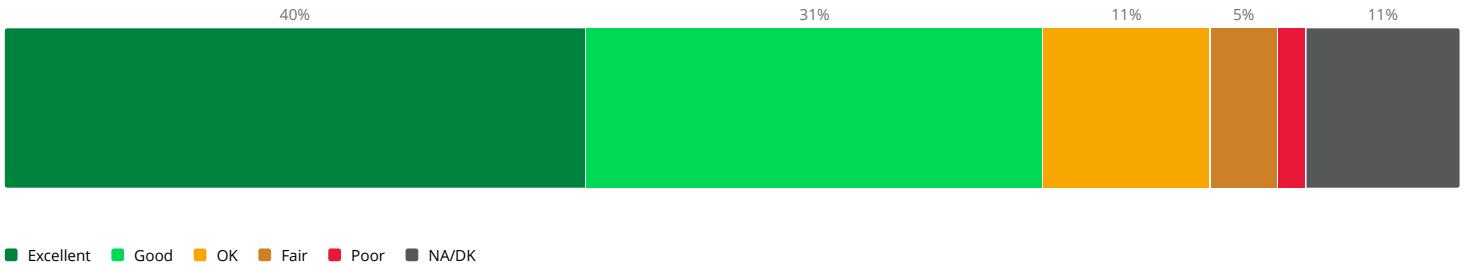
P.10 Defining responsibilities and setting expectations for board member performance.



P.11 Respecting the distinct roles of the chief executive, board, and staff.



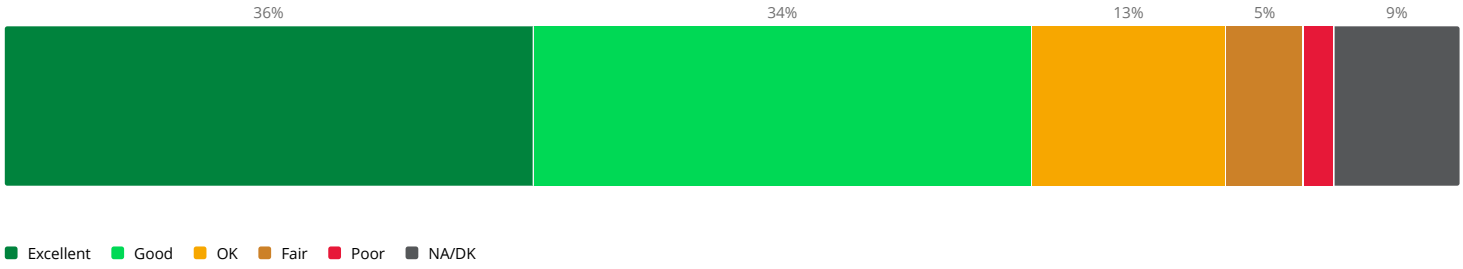
P.12 Periodically reviewing and updating the bylaws, board policies, and board procedures.



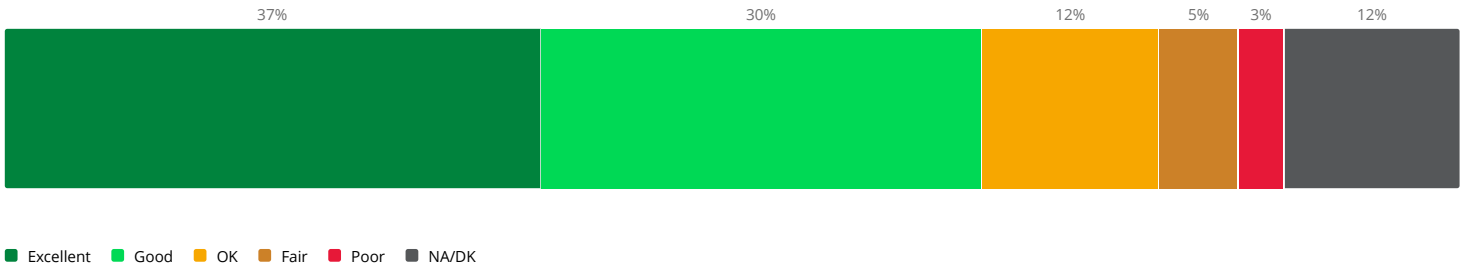
P.13 Following and enforcing the board's conflict-of-interest policy.



P.14 Reviewing the board's committee structure and use of task forces to ensure they effectively support the work of the board.



P.15 Establishing policies for reviewing and refreshing the board, including term limits.



Board Meetings | Section Detail

Scores are based on a 5-point scale using the following definitions:

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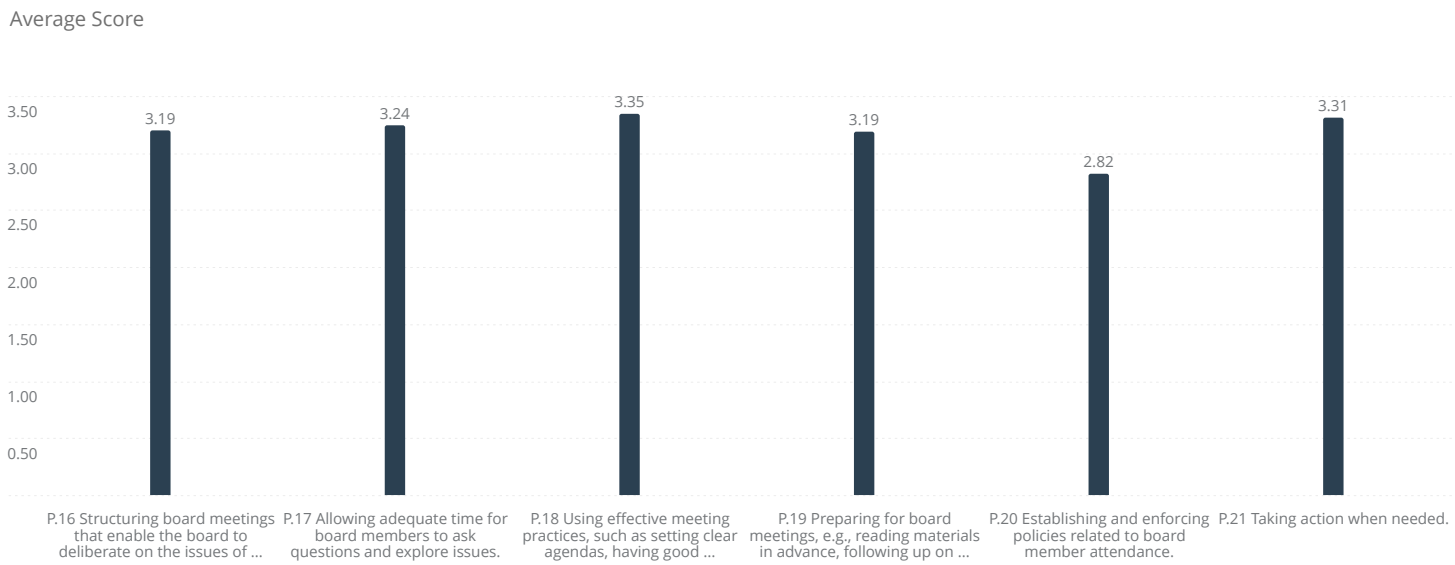
Responses of NA/Don't Know are excluded from analysis

Ways to Strengthen Performance Through Action

- Shape your board meetings in such a way that they invite board engagement.
- Approach meetings as a vital resource in service to the organization's sustainability and plan accordingly.
- Make sure the agenda ties in with the strategic plan. Focus on your big issues.
- Board members: Read the materials sent to you in advance of the meeting. Come to the meeting prepared. Be ready to participate.

BoardSource Resources on Board Meetings:

- Free Community Resource: Board Meeting Preparation:10 Tips for Chief Executives and Board Chairs
- Members-Only Resource: Facilitating an Engaged Board



Scoring Breakdown

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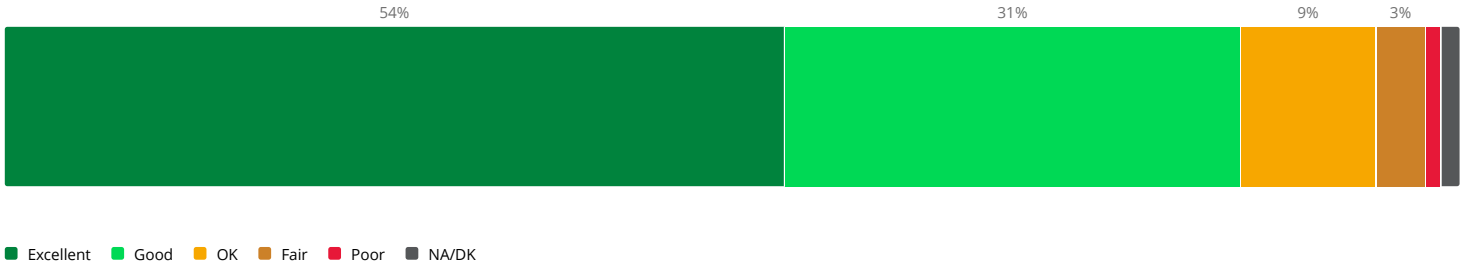
P.16 Structuring board meetings that enable the board to deliberate on the issues of greatest organizational importance.



P.17 Allowing adequate time for board members to ask questions and explore issues.



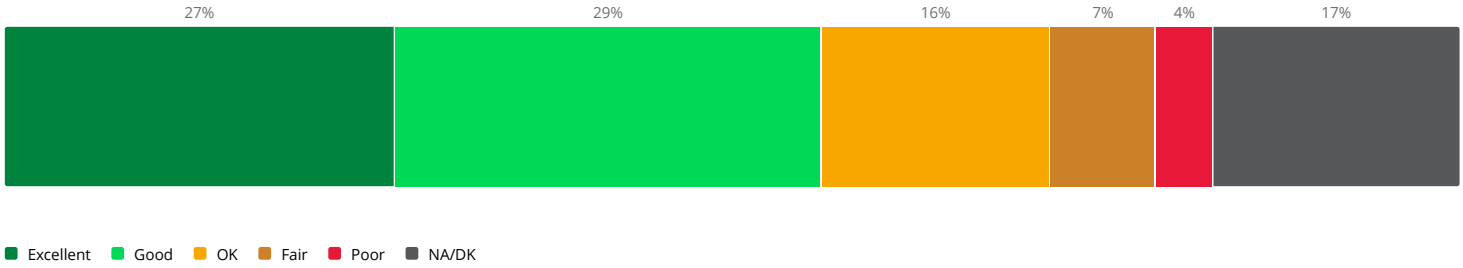
P.18 Using effective meeting practices, such as setting clear agendas, having good facilitation, and managing time well.



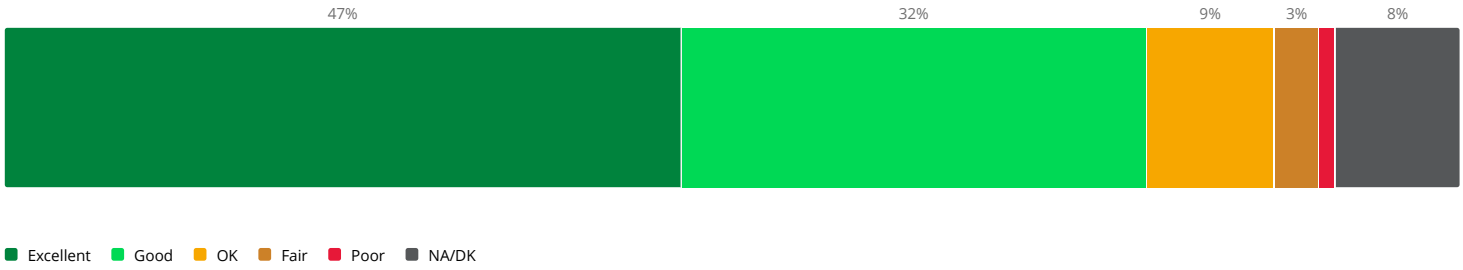
P.19 Preparing for board meetings, e.g., reading materials in advance, following up on assignments.



P.20 Establishing and enforcing policies related to board member attendance.



P.21 Taking action when needed.



C | The CULTURE

How the board conducts its work — from group dynamics to its relationship with the chief executive — can help or hinder the board's ability to carry out its work. Likewise, board culture and dynamics are also affected by who serves on the board and the nature of the work that the board undertakes. How board members communicate with each other, work as a team, and make decisions all define the culture of the board. The combination of formal and informal rules, traditions, and agreements that develop over time inform how a board interacts, deliberates, and ultimately performs as a governing body.

The Culture | Section Detail

Scores are based on a 5-point scale using the following definitions:

0 = Poor or needs improvement | 1 = Fair or marginal | 2 = OK or acceptable | 3 = Good or above average | 4 = Excellent or superior

Responses of NA/Don't Know are excluded from analysis

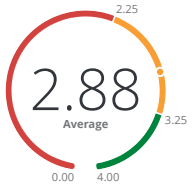
Ways to Strengthen Performance Through Action

- Consider board culture as a key factor in board performance.
- Envision, as a team, what an ideal board culture would look like.
- Reflect on what investments have been made to date toward a healthy board culture.

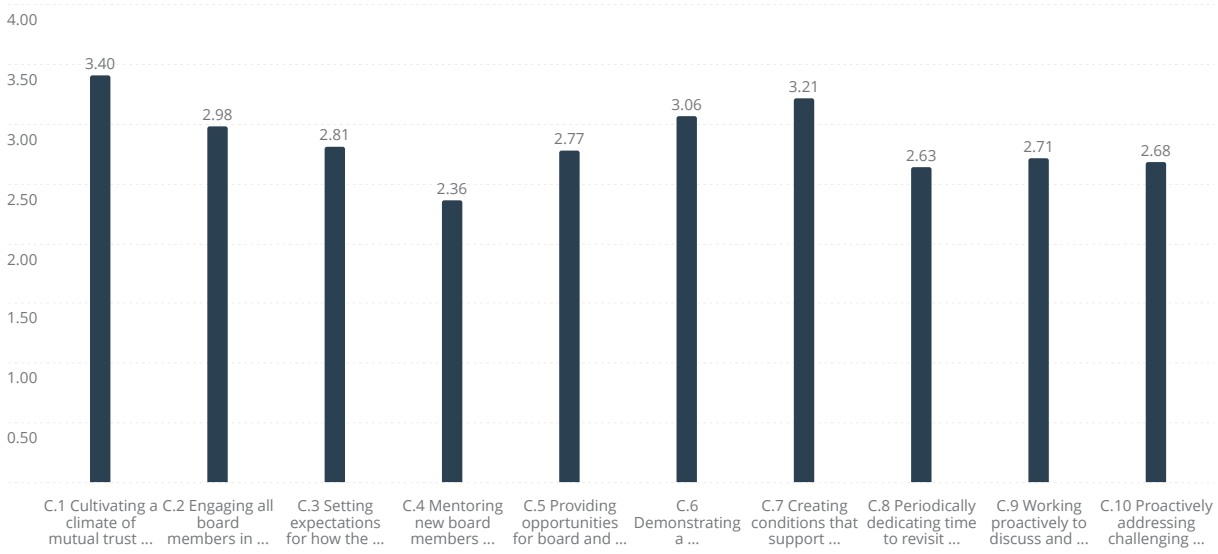
BoardSource Resources on Board Culture:

- Free Community Resource: Catalytic Questions
- Members-Only Resource: 18 Questions About Board Culture
- Members-Only Resource: Eight Ways to Increase Your Board's Ability to Work as a Team

Average score for The Culture section:



Average Scores for All Boards for each question within The Culture section:



Scoring Breakdown

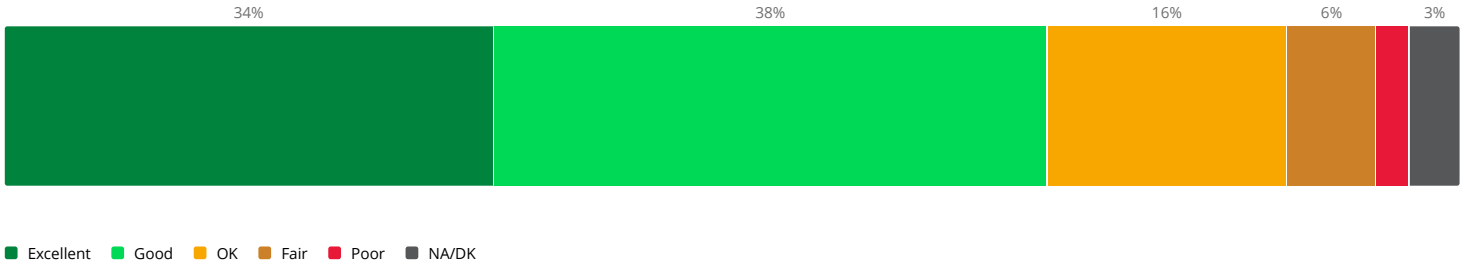
Breakdown bars below will show the % a scoring option is chosen. Use the legend below or beneath each breakdown chart to identify the individual scoring options.



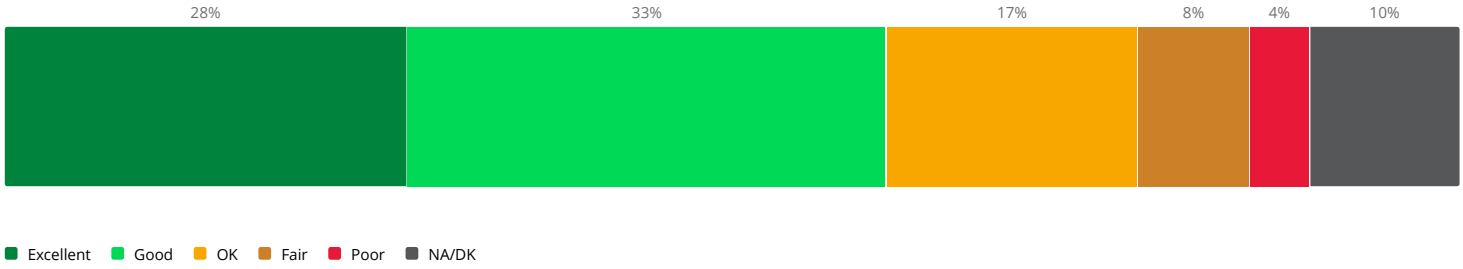
C.1 Cultivating a climate of mutual trust and respect between board members.



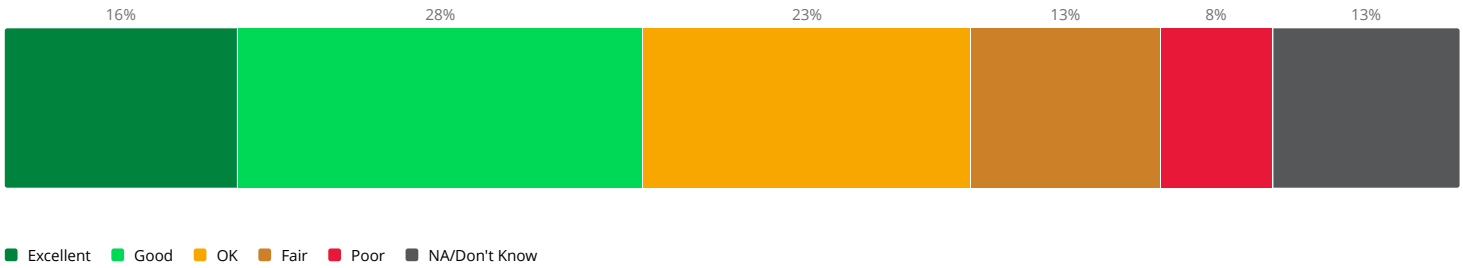
C.2 Engaging all board members in the work of the board.



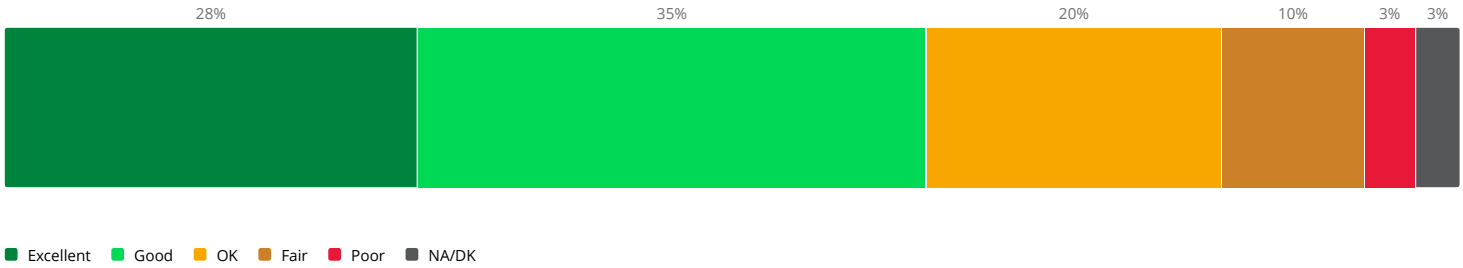
C.3 Setting expectations for how the board works together as a part of board orientation.



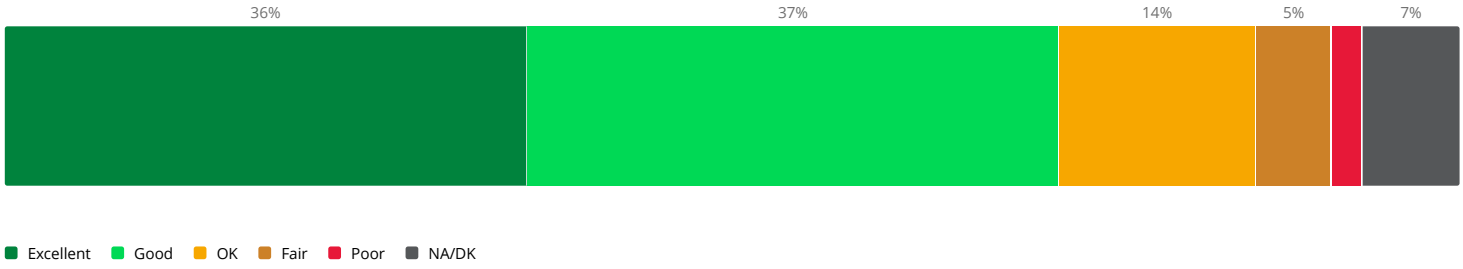
C.4 Mentoring new board members throughout their first year on the board.



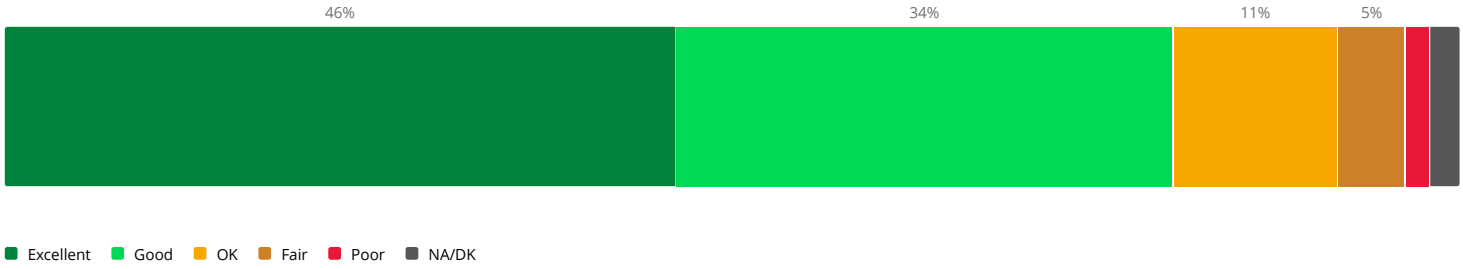
C.5 Providing opportunities for board and staff to get to know each other.



C.6 Demonstrating a commitment to being inclusive in processes, decision making, and officer/committee chair selection.



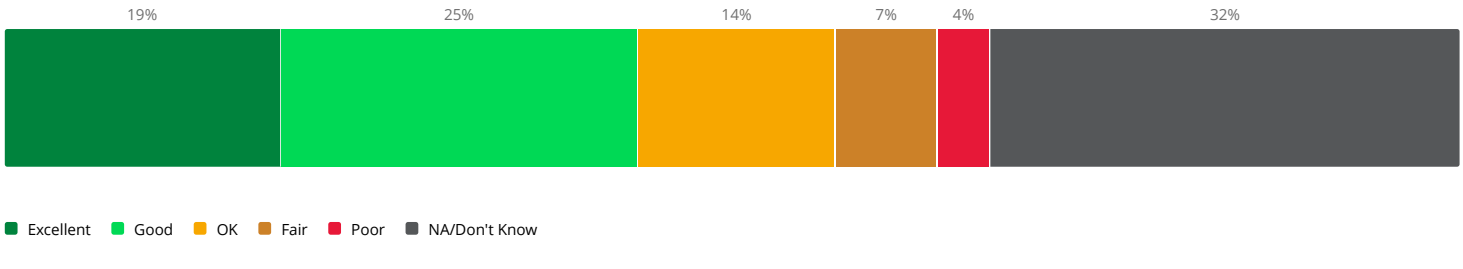
C.7 Creating conditions that support candor, robust discussions, and ensure all voices are heard.



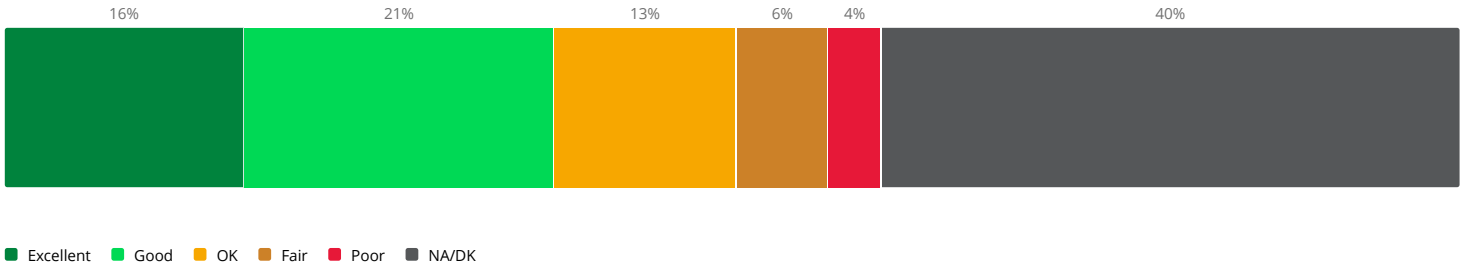
C.8 Periodically dedicating time to revisit board values and behaviors, and how they impact the work of the board.



C.9 Working proactively to discuss and address any dynamics within the board or between board members that may be negatively impacting the board's ability to share power equally.



C.10 Proactively addressing challenging board behavior.



W | The WORK

Boards are charged with important responsibilities. Some of these responsibilities are more fundamental, such as understanding the organization's mission and providing financial oversight. Other responsibilities are more strategic and adaptive — such as providing strategic direction and partnership with the chief executive — and still others address external leadership and ambassadorship. This section explores how well the board understands its responsibilities in each of these areas.

Responsibilities within this section include:

Mission, Vision, and Strategic Direction: *One of the board's primary roles is to set strategic direction. 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.*

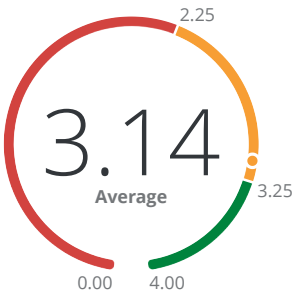
Program Oversight: *The board is responsible for program oversight and should work in collaboration with staff to understand the scope of the organization's programs and services, establish appropriate goals for quality and results, and monitor performance data. To strengthen the board's program oversight, board members should be provided with opportunities to connect with and deepen their understanding of the organization's mission and work.*

Financial Oversight: *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.*

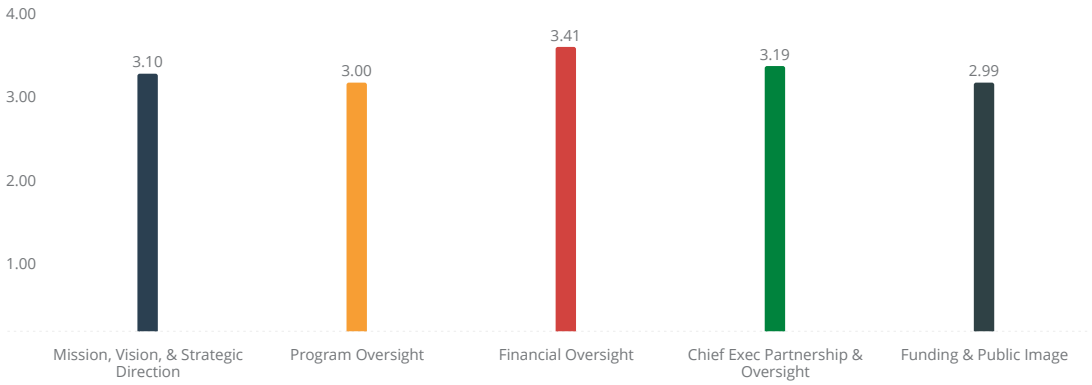
Chief Executive Partnership & Oversight: *The primary board-staff relationship is between the board and the chief executive, and the quality of this relationship is of the utmost importance to the success of the organization. To be effective, the board and chief executive need a close working relationship based on mutual trust and an appreciation of their respective roles in leading the organization. As part of its responsibility for supervising the chief executive, the board ensures that a current job description outlines the duties of the role, then evaluates the chief executive annually and determines appropriate executive compensation.*

Funding & Public Image: Every nonprofit requires adequate financial resources and a positive public image to accomplish its mission. To ensure the organization's financial sustainability, the board should make sure the organization has an appropriate mix of income and support the organization's fundraising strategy by participating in fundraising. Members can do this in a number of ways, including making personal contributions, connecting staff to potential donors, and soliciting friends and colleagues. The board is also responsible for building, protecting, and promoting the organization's public standing. To meet this responsibility, board members serve as ambassadors to the community and as an essential element of an organization's outreach efforts.

Average score for The Work section:



Average score for responsibilities held within The Work section:



Mission, Vision, & Strategic Direction | Section Detail

Scores are based on a 5-point scale using the following definitions:

0 = Poor or needs improvement | 1 = Fair or marginal | 2 = OK or acceptable | 3 = Good or above average | 4 = Excellent or superior

Responses of NA/Don't Know are excluded from analysis

The following are key elements to consider when setting direction are your organization's mission, vision, and values:

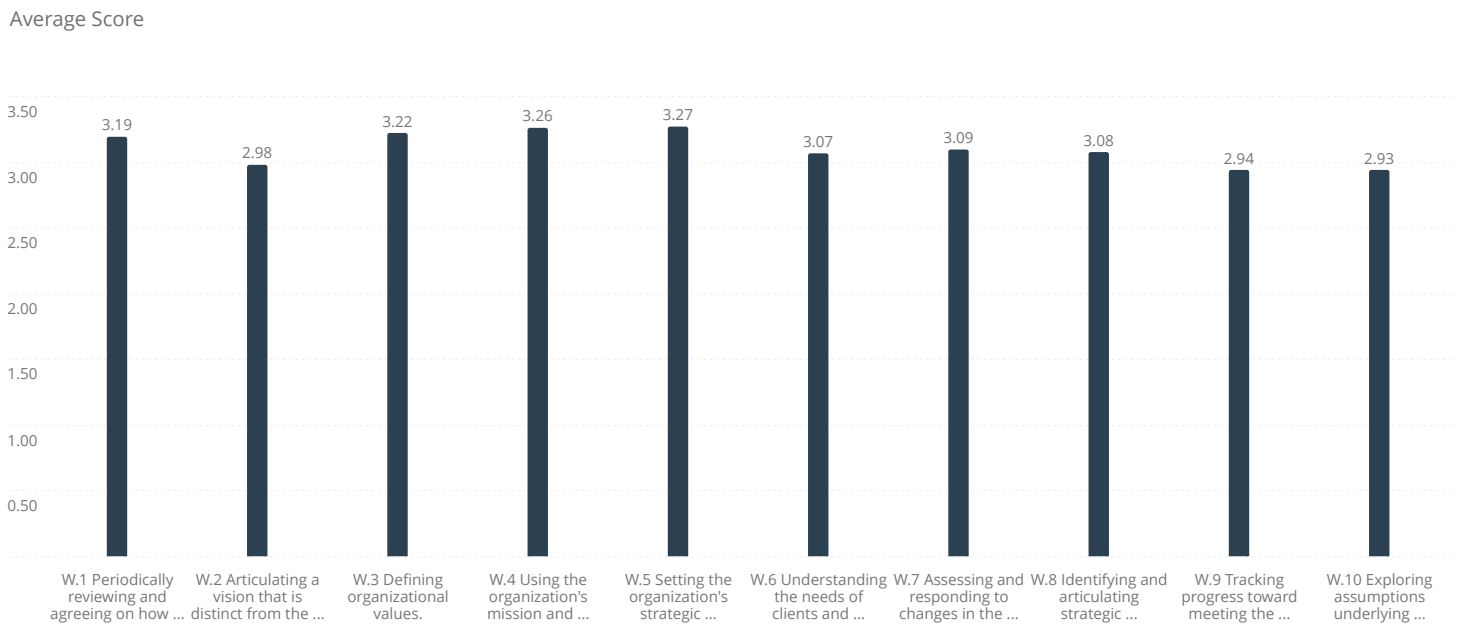
- A mission statement defines your organization's fundamental purpose. A clear mission statement is inspirational yet realistic, emotional as well as informative, concise and complete. It is positive and focuses on achievable accomplishments.
- The vision statement is about long-term goals and the direction 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 boards 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.

Ways to Strengthen Performance Through Action

- Occasionally revisit the organization's mission and vision statements to ensure that the organization remains relevant.
- Work together with the chief executive to provide guidance and input in developing the strategic planning process.
- Elevate strategic thinking by incorporating it into every board meeting rather than relegating it to annual retreats or strategic planning processes.

BoardSource Resources on Mission, Vision, & 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

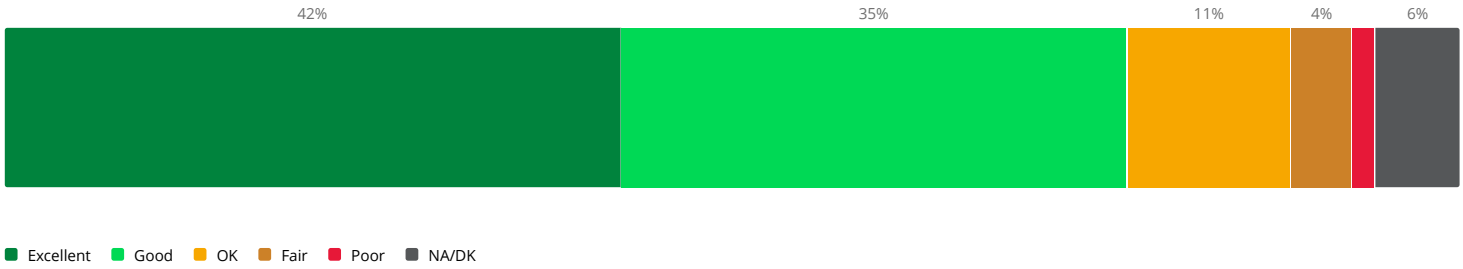


Scoring Breakdown

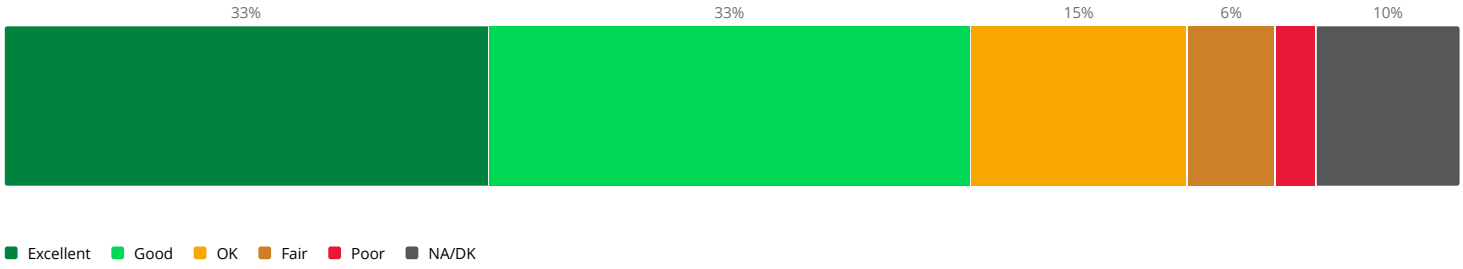
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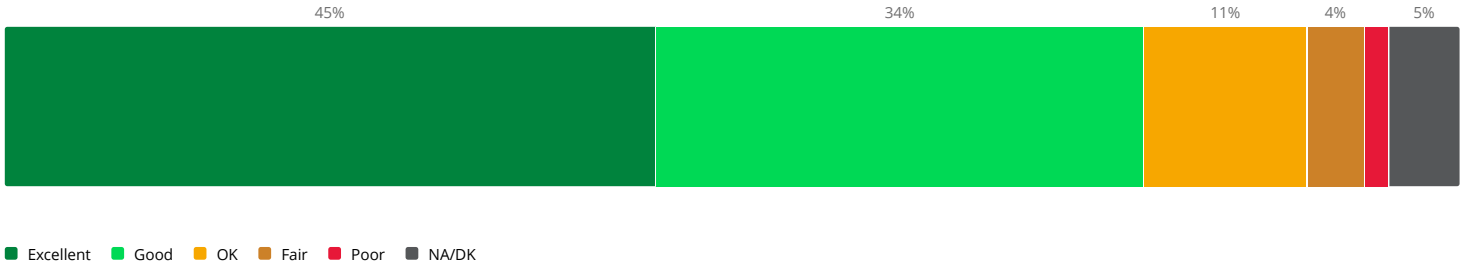
W.1 Periodically reviewing and agreeing on how the organization should fulfill its mission.



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



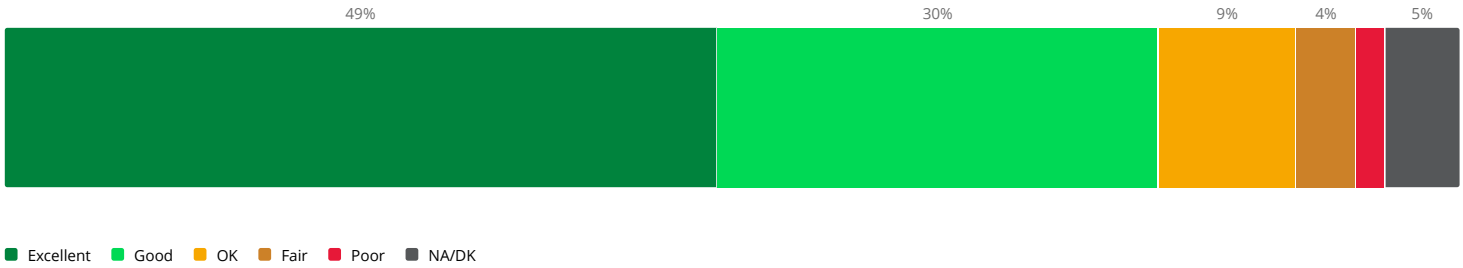
W.3 Defining organizational values.



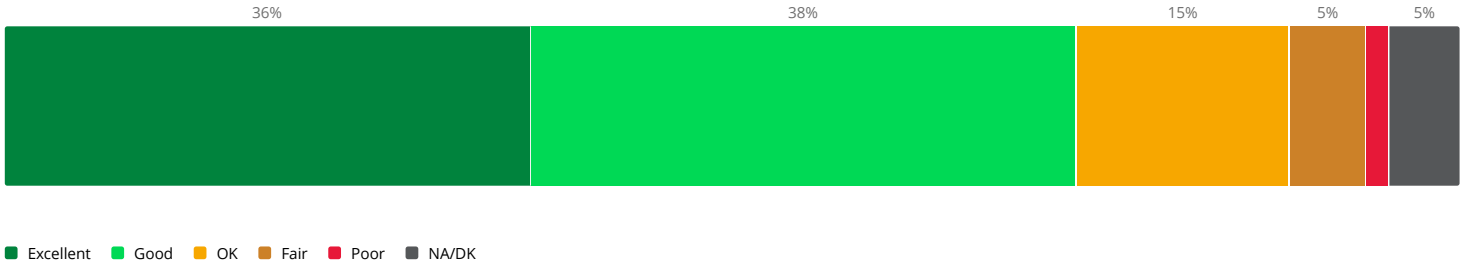
W.4 Using the organization's mission and values to drive decisions.



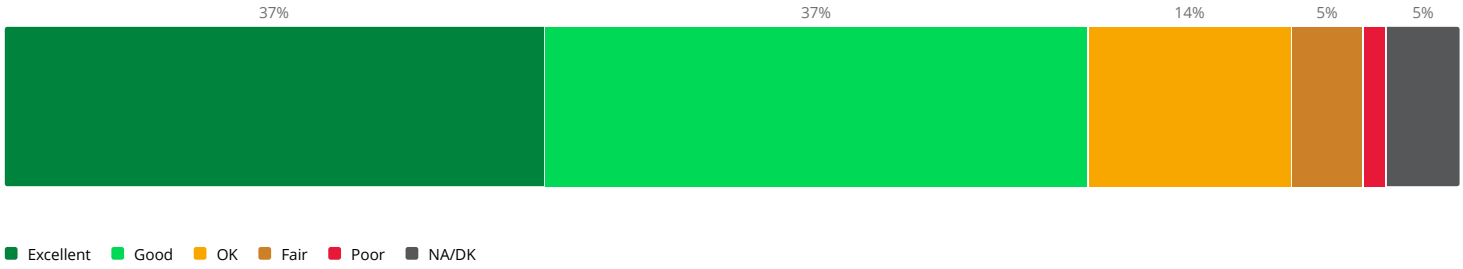
W.5 Setting the organization's strategic direction in partnership with the chief executive.



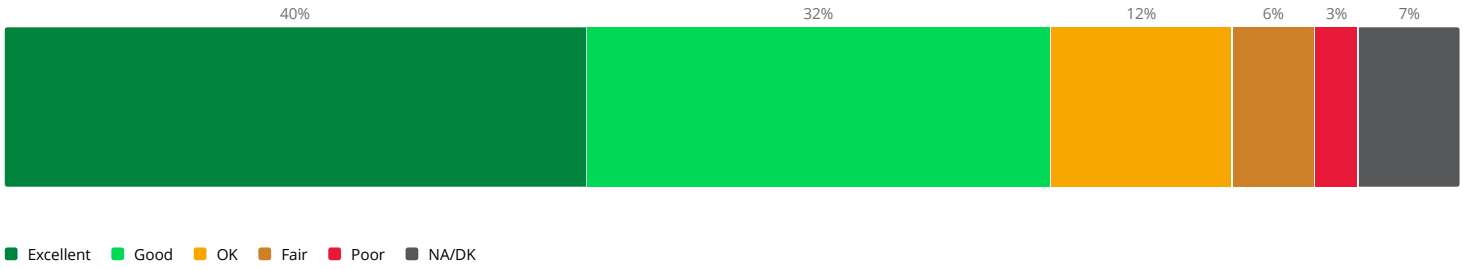
W.6 Understanding the needs of clients and stakeholders and how they may be changing.



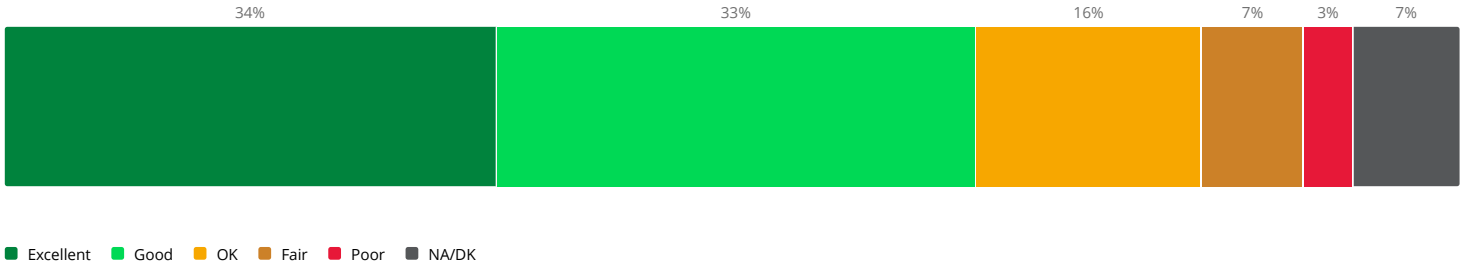
W.7 Assessing and responding to changes in the organization's environment.



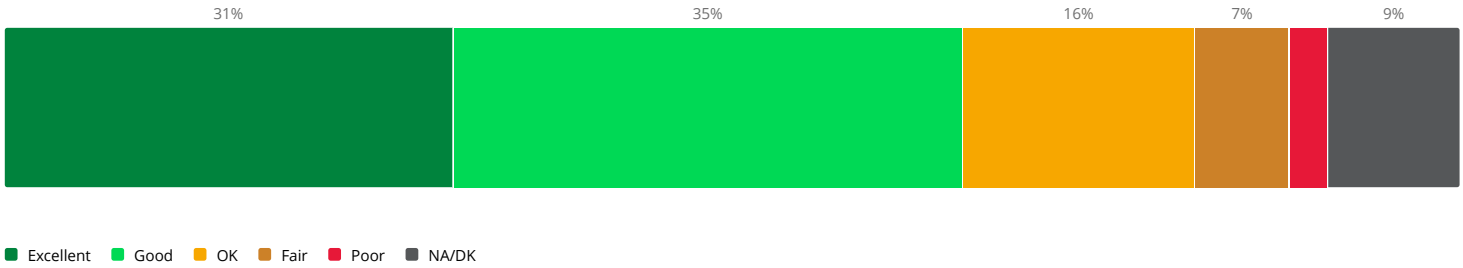
W.8 Identifying and articulating strategic imperatives and goals for the organization through a thoughtful strategic planning process.



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.



Program Oversight | Section Detail

Scores are based on a 5-point scale using the following definitions:

0 = Poor or needs improvement | 1 = Fair or marginal | 2 = OK or acceptable | 3 = Good or above average | 4 = Excellent or superior

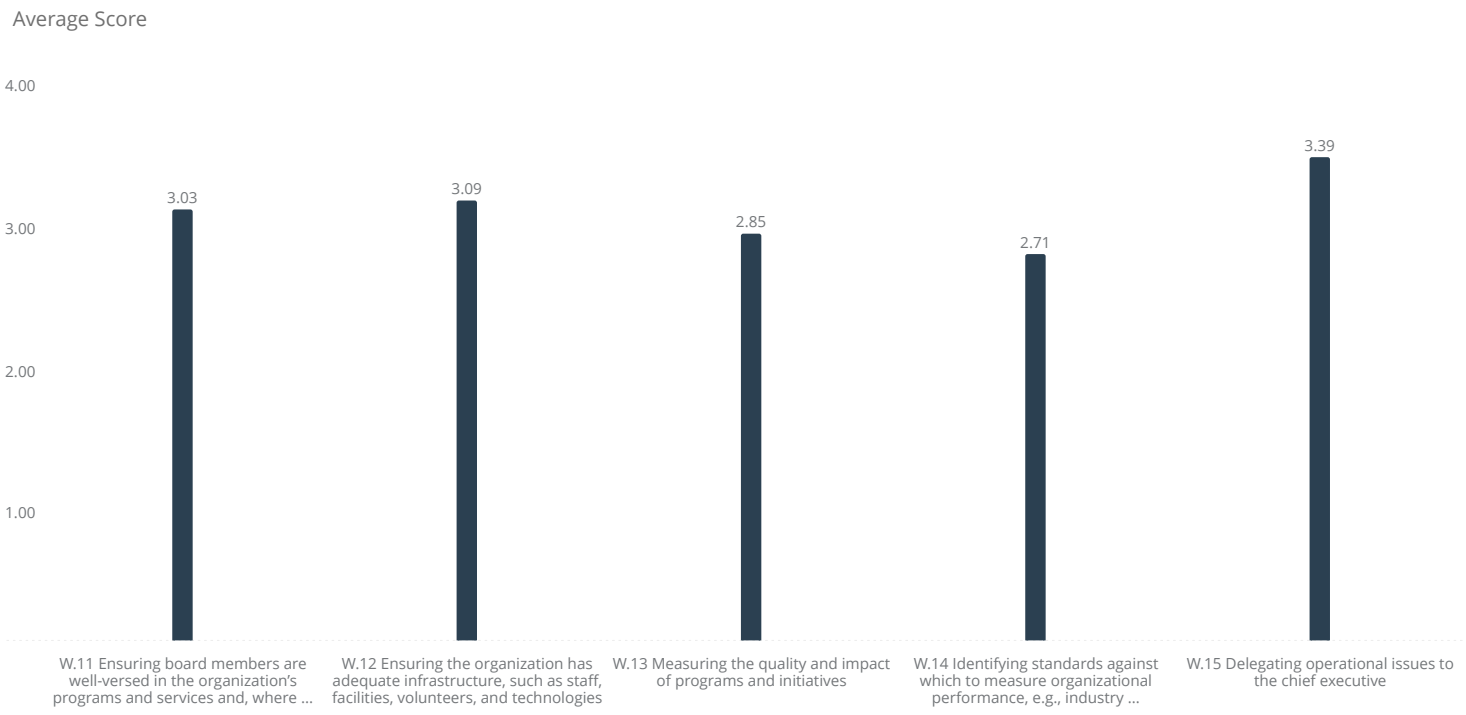
Responses of NA/Don't Know are excluded from analysis

Ways to Strengthen Performance Through Action

- Embrace board education around programs and services as an ongoing activity.
- Devote time to discussions of what kinds of program data are board — rather than management — related.
- Determine how to provide the board with the information it needs to make data-driven and informed decisions while avoiding report overload at board meetings.

BoardSource Resources on Program Oversight:

- Book: *The Nonprofit Dashboard: Using Metrics to Drive Mission Success*
- Free Community Resource: Strengthen Your Board's Leadership by Increasing Its Understanding of Programs
- Members-Only Resource: Identifying and Managing Risk
- Members-Only Resource: Nonprofit Programmatic Oversight Tool

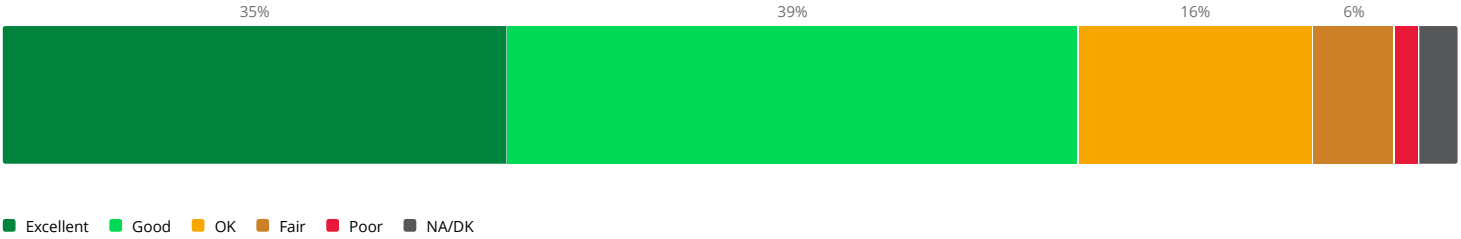


Scoring Breakdown

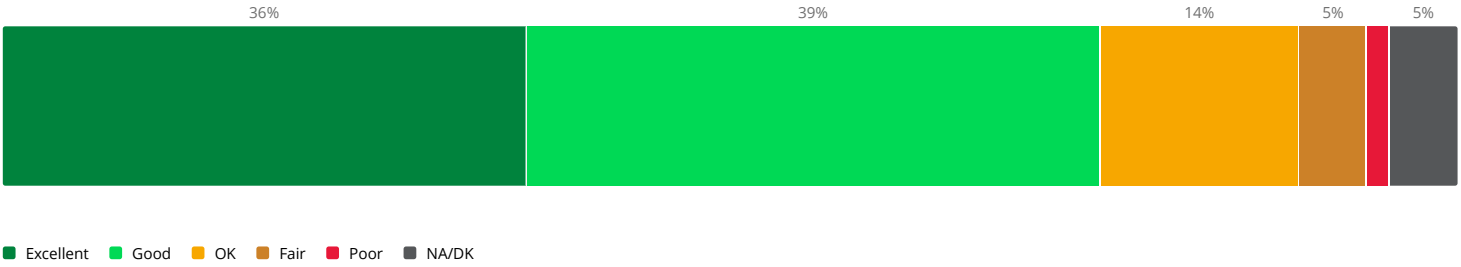
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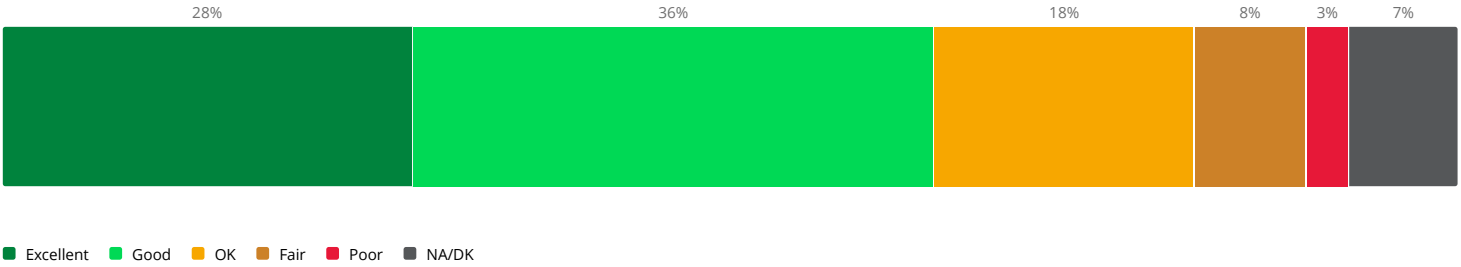
W.11 Ensuring board members are well-versed in the organization's programs and services and, where appropriate, have an opportunity to experience the programs.



W.12 Ensuring the organization has adequate infrastructure, such as staff, facilities, volunteers, and technologies.



W.13 Measuring the quality and impact of programs and initiatives.



W.14 Identifying standards against which to measure organizational performance, e.g., industry benchmarks, competitors, or peers.



W.15 Delegating operational issues to the chief executive.



Financial Oversight | Section Detail

Scores are based on a 5-point scale using the following definitions:

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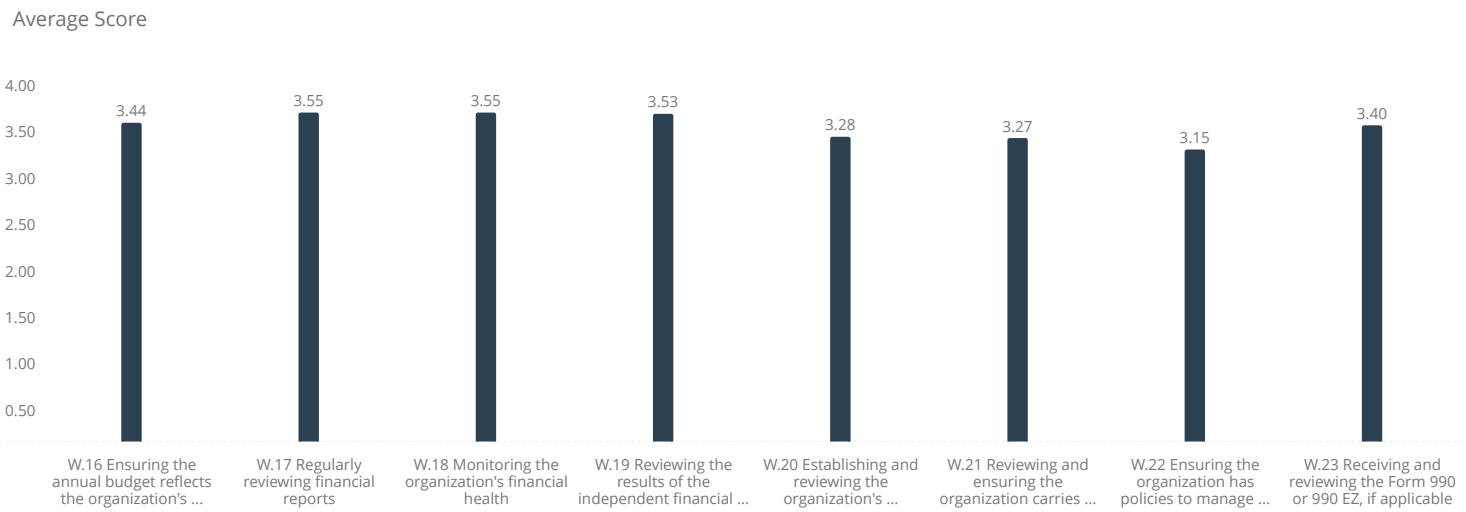
Responses of NA/Don't Know are excluded from analysis

Ways to Strengthen Performance Through Action

- Assist all board members in understanding nonprofit financial statements through onboarding activities and ongoing education.
- Cultivate a climate of partnership, transparency, and rigorous ethics among board finance committee members and finance staff.
- 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.

BoardSource Resources on 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



Scoring Breakdown

Breakdown bars below will show the % a scoring option is chosen. Use the legend below or beneath each breakdown chart to identify the individual scoring options.



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



W.17 Regularly reviewing financial reports.



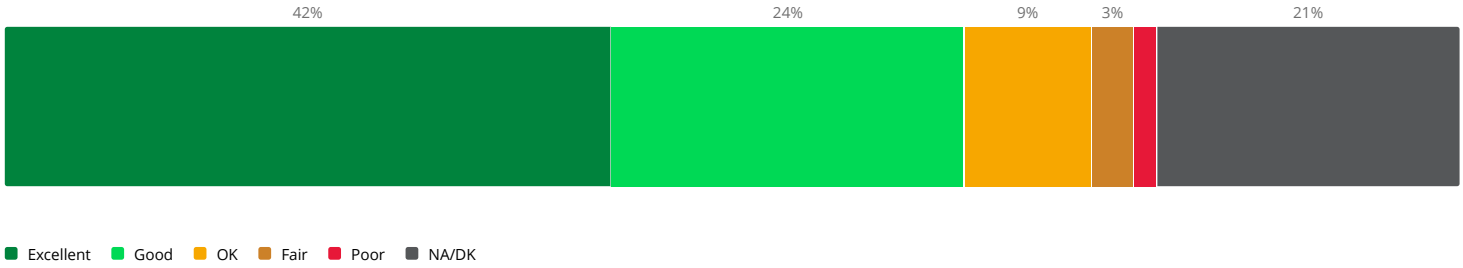
W.18 Monitoring the organization's financial health.



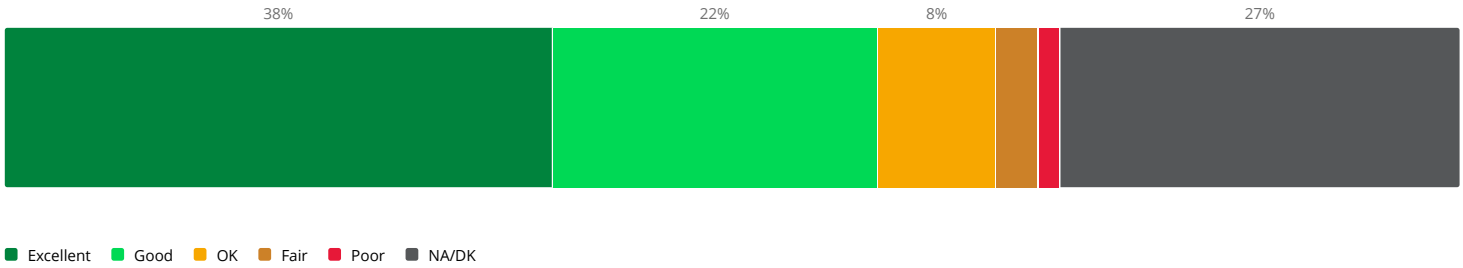
W.19 Reviewing the results of the independent financial audit and management letter.



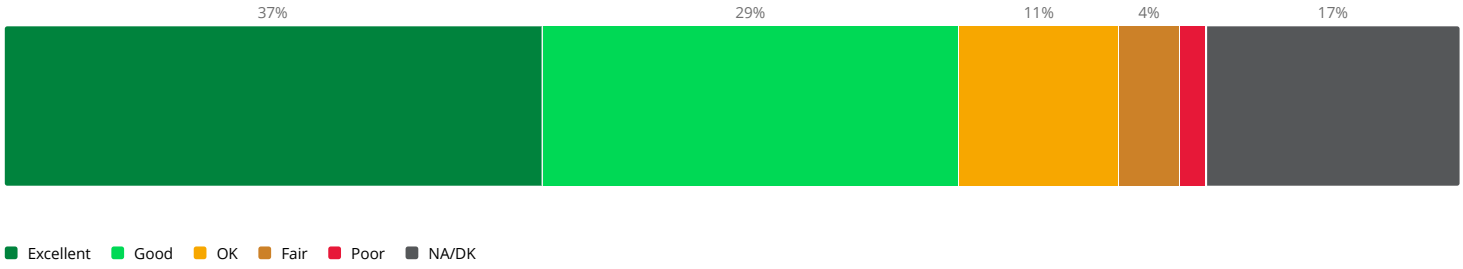
W.20 Establishing and reviewing the organization's investment policies.



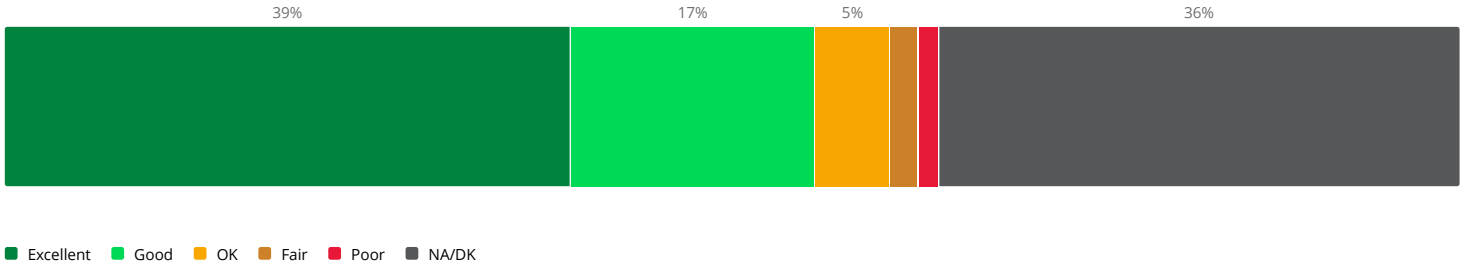
W.21 Reviewing and ensuring the organization carries adequate insurance.



W.22 Ensuring the organization has policies to manage risks, e.g., internal controls, personnel policies, emergency preparedness.



W.23 Receiving and reviewing the Form 990 or 990 EZ, if applicable.



Chief Executive Partnership & Oversight | Section Detail

Scores are based on a 5-point scale using the following definitions:

0 = Poor or needs improvement | 1 = Fair or marginal | 2 = OK or acceptable | 3 = Good or above average | 4 = Excellent or superior

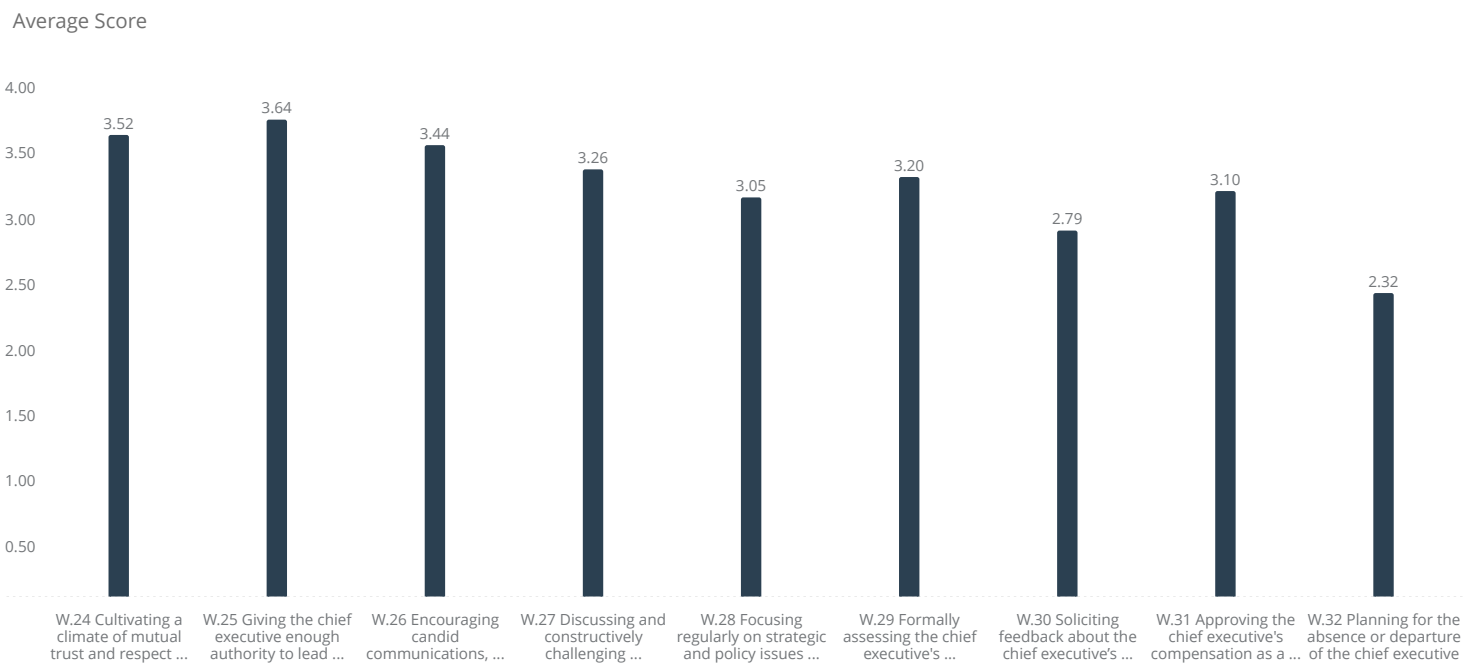
Responses of NA/Don't Know are excluded from analysis

Ways to Strengthen Performance Through Action

- Provide the chief executive with a clear job description and mutually agreed-upon annual expectations.
- Recognize that effective board-chief executive partnerships, like all relationships, should be flexible in nature. Practices, communication, and assumptions may occasionally need to be recalibrated.
- Ensure full board participation in the chief executive evaluation (feedback, final approval) even if a committee leads the process.

BoardSource Resources on Chief Executive Partnership & Oversight:

- Members-Only Resource: Setting Goals for Your CEO
- Book: *Govern More, Manage Less*
- Free Community Resource: Board Chair and Chief Executive Partnership



Scoring Breakdown

Breakdown bars below will show the % a scoring option is chosen. Use the legend below or beneath each breakdown chart to identify the individual scoring options.



W.24 Cultivating a climate of mutual trust and respect between the board and chief executive.



W.25 Giving the chief executive enough authority to lead the staff and manage the organization.



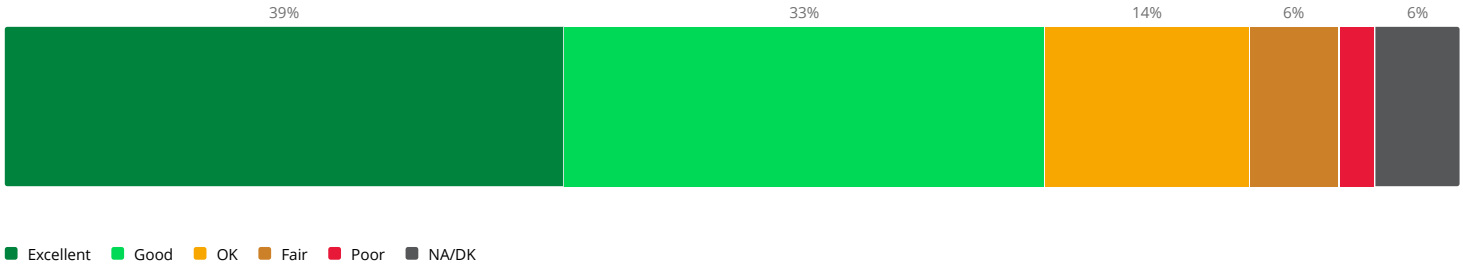
W.26 Encouraging candid communications, including the sharing of challenges and issues in a timely manner.



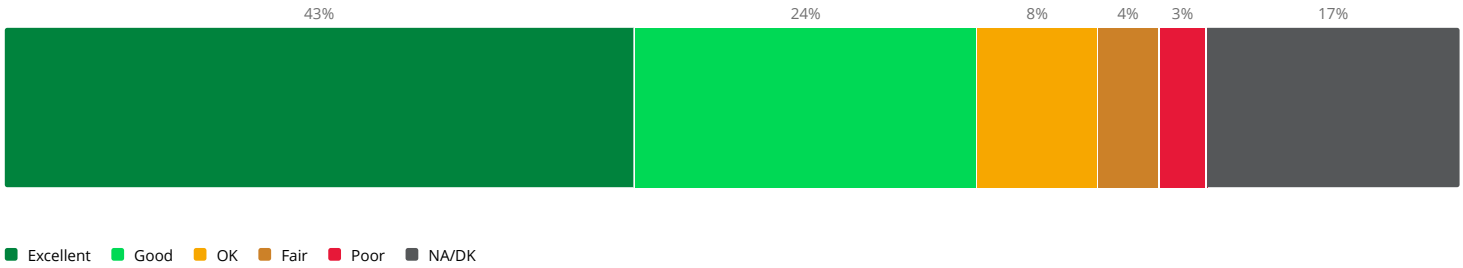
W.27 Discussing and constructively challenging recommendations made by the chief executive.



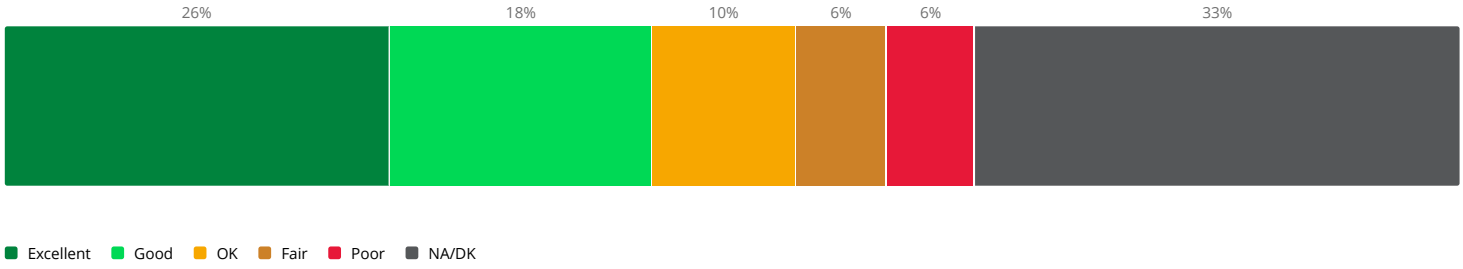
W.28 Focusing regularly on strategic and policy issues versus operational issues.



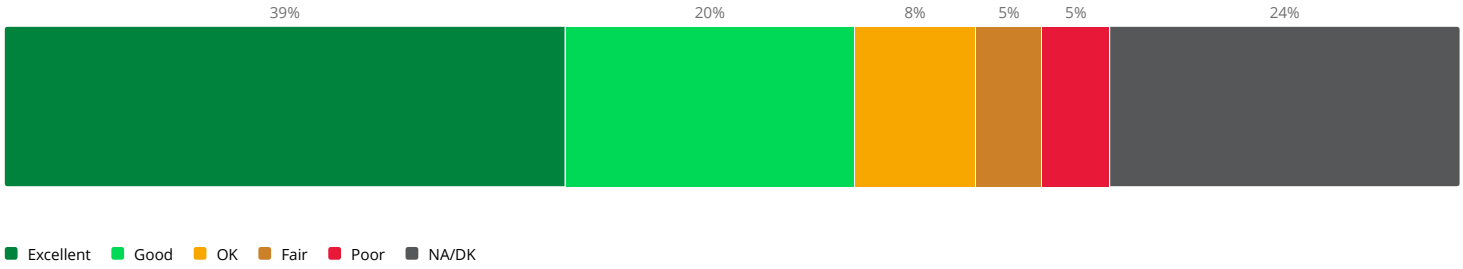
W.29 Formally assessing the chief executive's performance annually and setting performance goals.



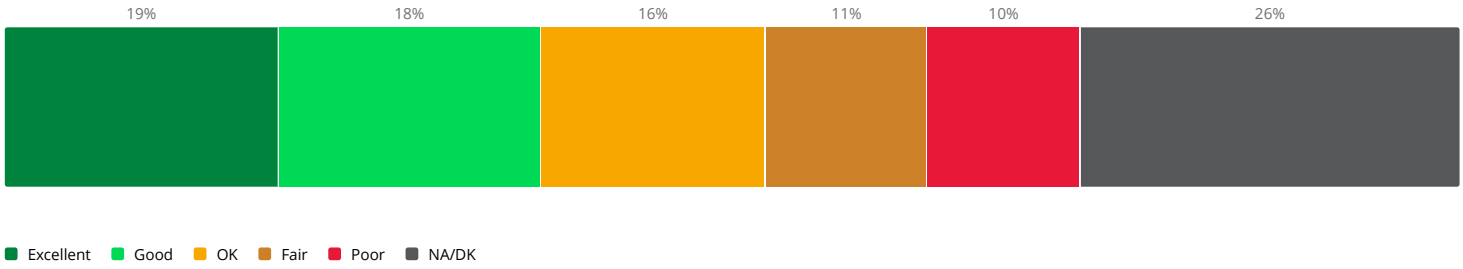
W.30 Soliciting feedback about the chief executive's performance from direct reports.



W.31 Approving the chief executive's compensation as a full board, using comparable data from other organizations.



W.32 Planning for the absence or departure of the chief executive.



Funding & Public Image | Section Detail

Scores are based on a 5-point scale using the following definitions:

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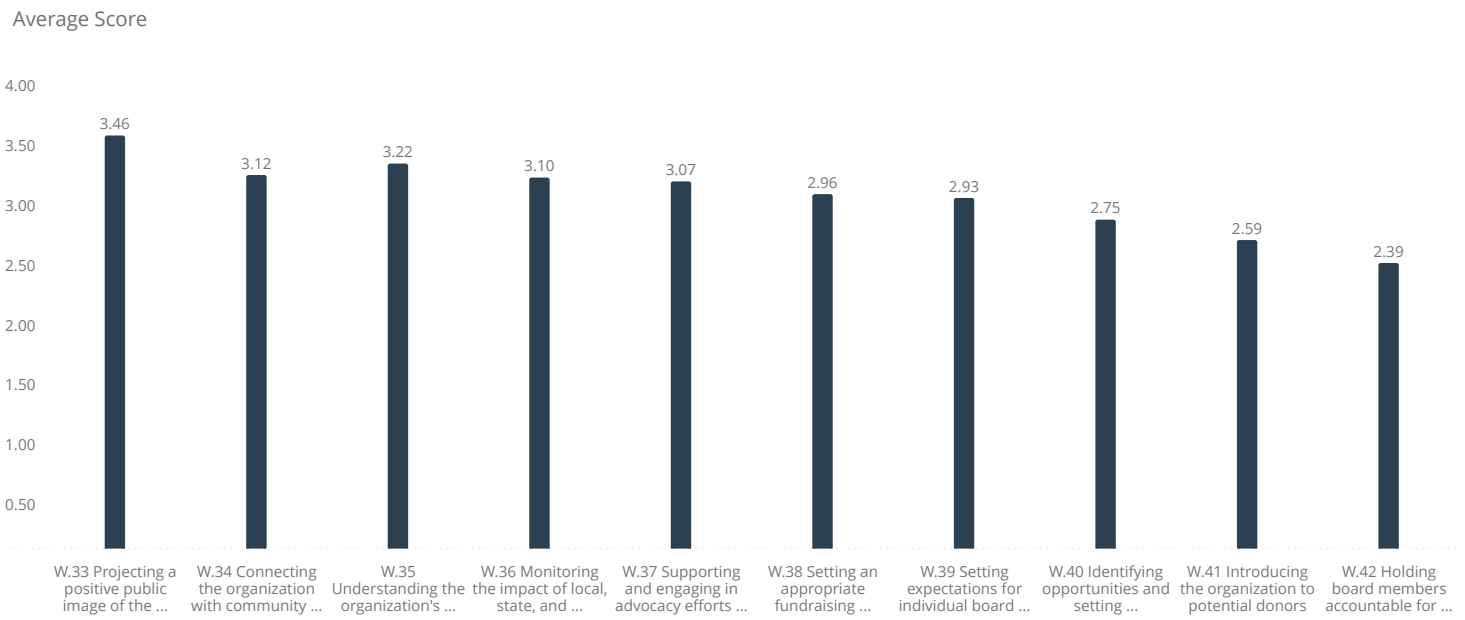
Responses of NA/Don't Know are excluded from analysis

Ways to Strengthen Performance Through Action

- Consider the partnership climate between the board, executive, and staff as it relates to fundraising, specifically shared understanding of resource development strategies and fund development plans.
- Embrace opportunities for board members to participate in fundraising activities that are customized/individualized, aligned with organizational strategy, and clearly communicated.
- Evaluate the policy environment within which your organization operates.

BoardSource Resources on Funding & Public Image:

- Book: *Fundraising Responsibilities of Nonprofit Boards*
- Free community resource: Measuring Fundraising Effectiveness
- Free community resource: Stand for Your Mission



Scoring Breakdown

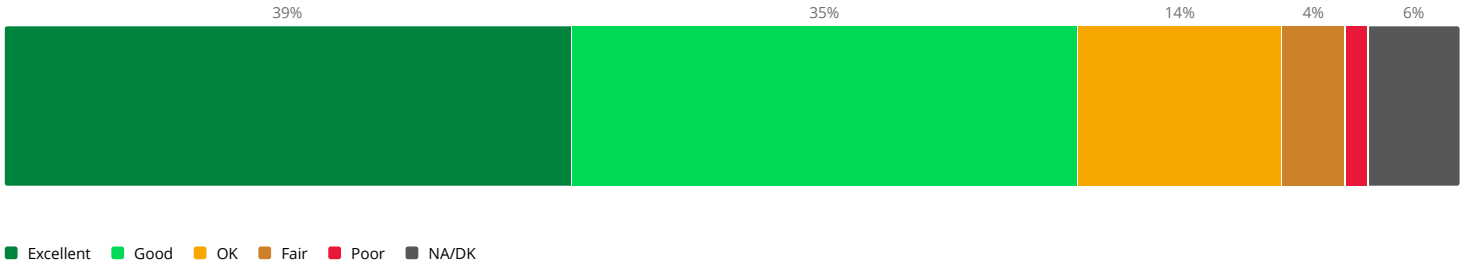
Breakdown bars below will show the % a scoring option is chosen. Use the legend below or beneath each breakdown chart to identify the individual scoring options.



W.33 Projecting a positive public image of the organization.



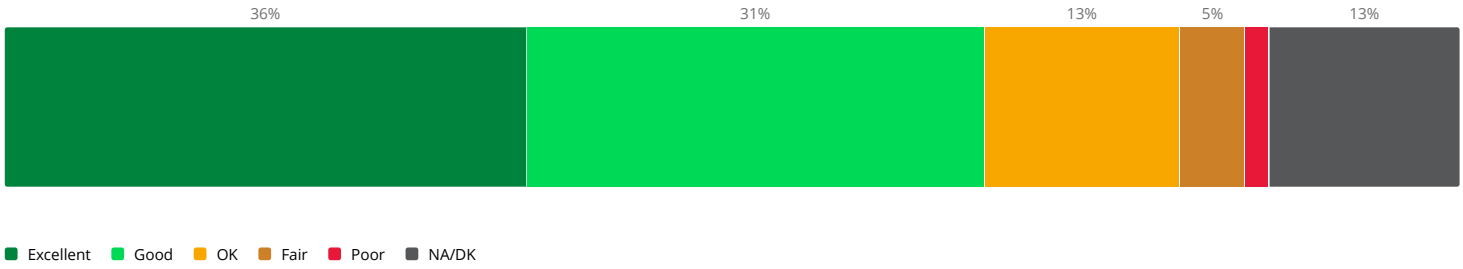
W.34 Connecting the organization with community leaders and potential collaboration partners.



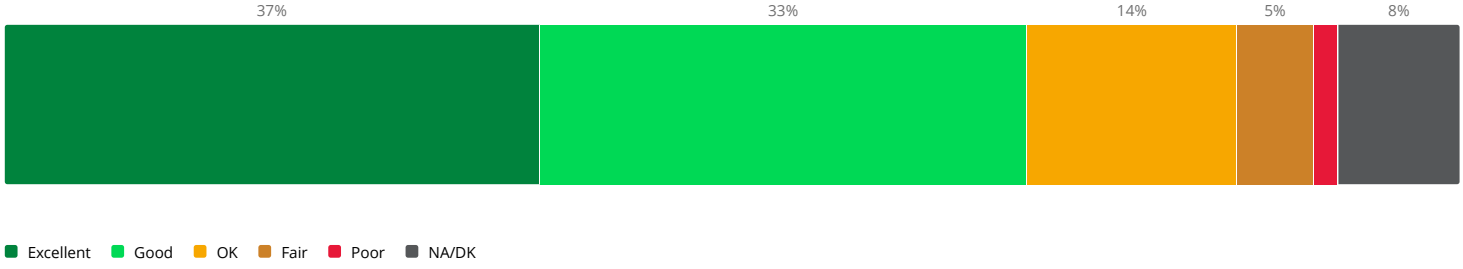
W.35 Understanding the organization's revenue mix, e.g., government funding, charitable gifts, fees for service, and how it aligns with the business model.



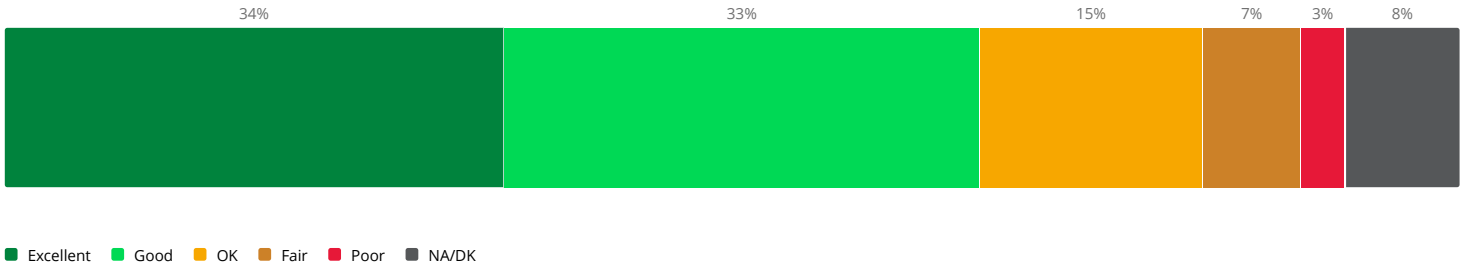
W.36 Monitoring the impact of local, state, and federal policy on the organization’s mission delivery and resources.



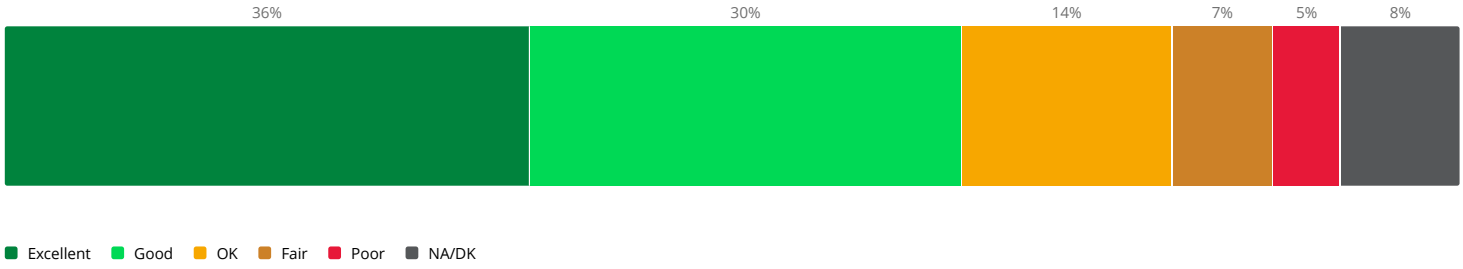
W.37 Supporting and engaging in advocacy efforts that can help the organization achieve its mission and purposes.



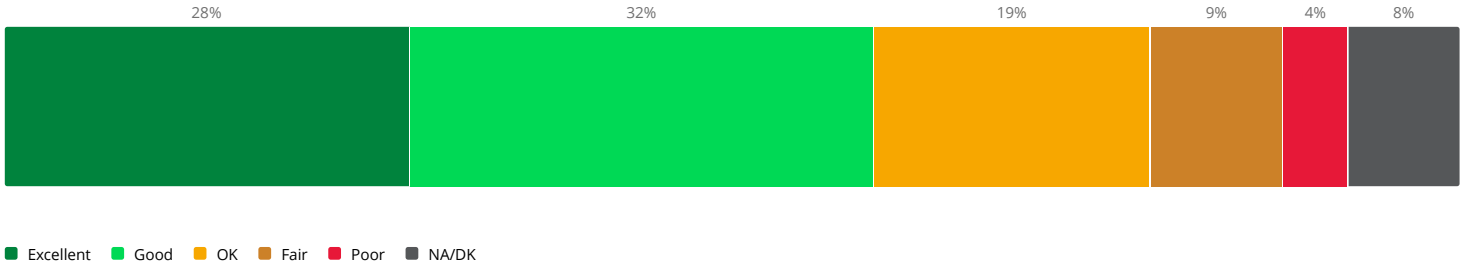
W.38 Setting an appropriate fundraising strategy in conjunction with the executive and relevant staff.



W.39 Setting expectations for individual board members to make a personal financial contribution.



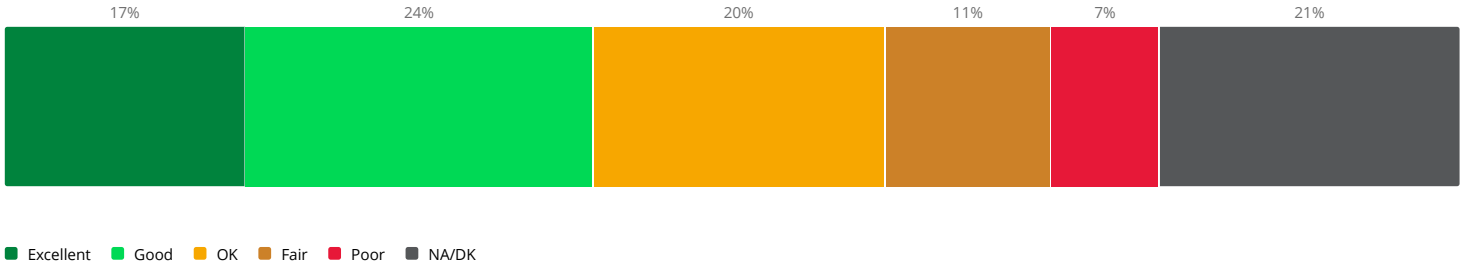
W.40 Identifying opportunities and setting expectations for individual board members to participate in fundraising activities and solicitations.



W.41 Introducing the organization to potential donors.



W.42 Holding board members accountable for fulfilling their fundraising responsibilities.



I | The IMPACT

This section explores the board's perception of its impact on organizational performance. The questions reflected here assess the board's connection to the organization's strategy, reputation, and overall effectiveness and the extent to whether this is a positive or negative impact. If the board has a negative or neutral impact on organizational performance, there's an opportunity to make improvements and better utilize the board's time and leadership as a vital resource. Leading with Intent data suggest two characteristics that both chief executives and board chairs report as having the strongest connection to board impact: understanding the board's role and responsibilities and the board's ability to work as a collaborative team.

The Impact | Section Detail

Scores are based on a 5-point scale using the following definitions:

0 = Very Negative | 1 = Somewhat Negative | 2 = Neutral | 3 = Somewhat Positive | 4 = Very Positive

Responses of Don't Know/No Opinion are excluded from analysis

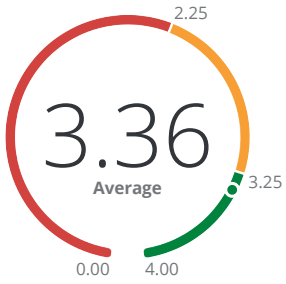
Ways to Strengthen Performance Through Action

- Discuss the board's results for this section, including what information or practices would better help the board in making a positive impact.
- Evaluate the impact results in light of your board's results in other sections of this report, looking for any potential relationships in high or low scoring areas.

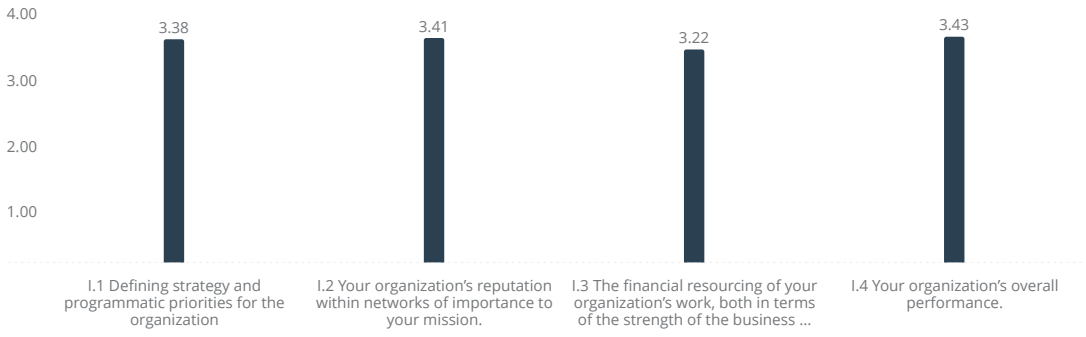
BoardSource Resources on Board Impact:

- Book: *The Source: 12 Principles of Governance That Power Exceptional Boards*
- Free Community Resource: What Makes a Good Board Member?
- Members-Only Resource: Eight Ways to Increase Your Board's Ability to Work as a Team

Average score for The Impact section:



Average Scores

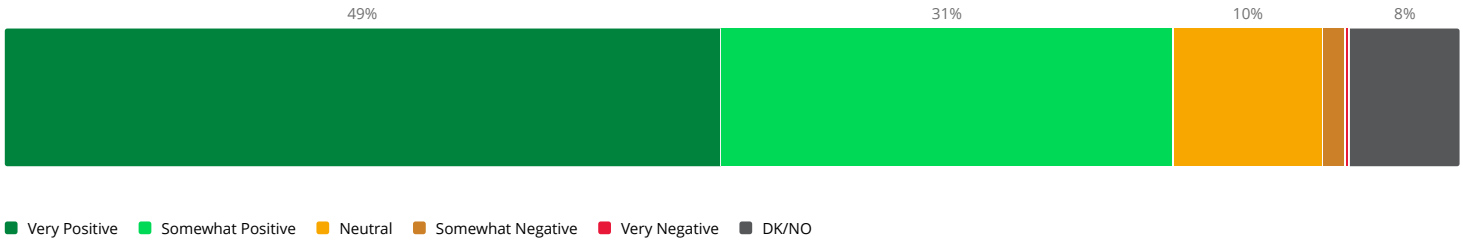


Scoring Breakdown

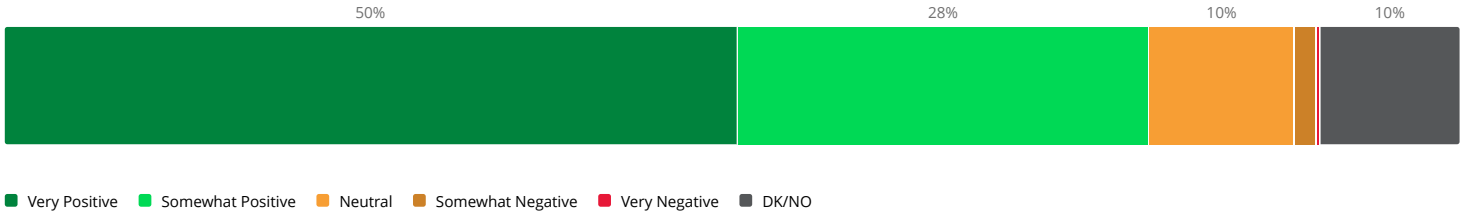
Breakdown bars below will show the % a scoring option is chosen. Use the legend below or beneath each breakdown chart to identify the individual scoring options.



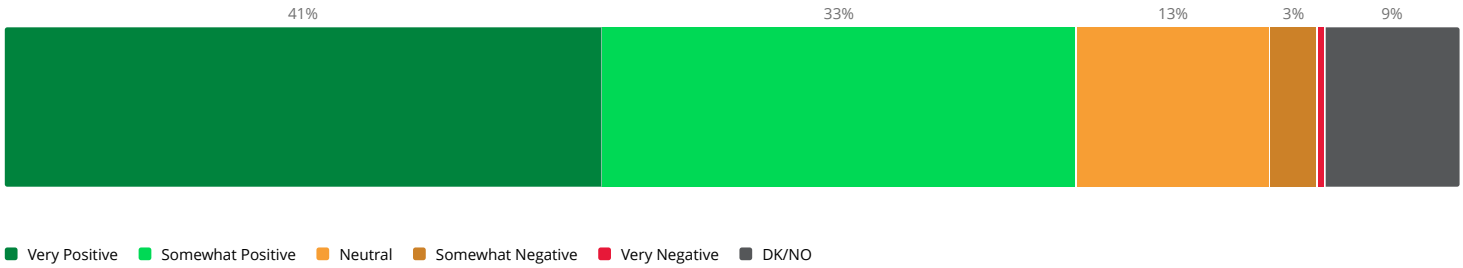
I.1 Defining strategy and programmatic priorities for the organization. (We asked that you assess both the quality/substance of the board's input and the clarity with which the board has defined these strategies and priorities.)



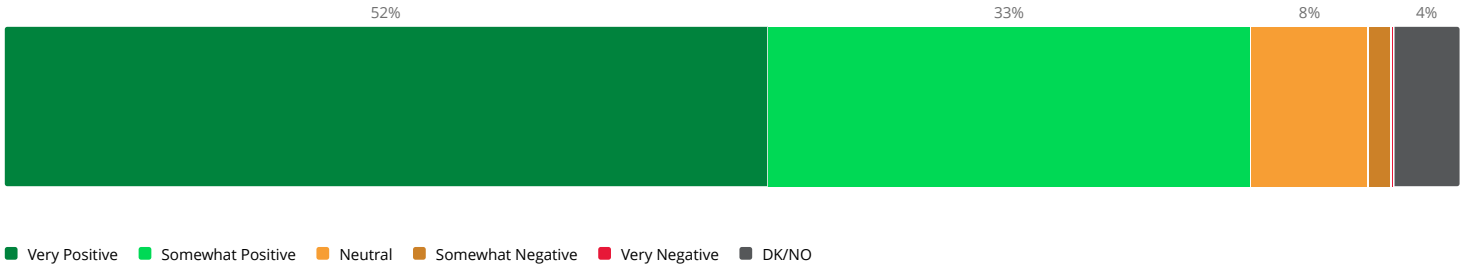
I.2 Your organization's reputation within networks of importance to your mission. (We asked that you focus specifically on the extent to which the board enhances the organization's reputation [by communicating the organization's values and priorities], rather than filtering it through the lens of fundraising or anything else.)



I.3 The financial resourcing of your organization's work, both in terms of the strength of the business model and the securing of revenues.



I.4 Your organization's overall performance.



Checklist of Practices

Certain policies and practices characterize an effective nonprofit board. Some of these practices are required by law; many others have become widely accepted as good practice.

Section Detail

The information in this section represent responses to questions answered only an organization's chief executive.

The four main practices outlined in this section are explained below:

Organizational Practices cover documents and procedures related to mission, strategy, and accountability.

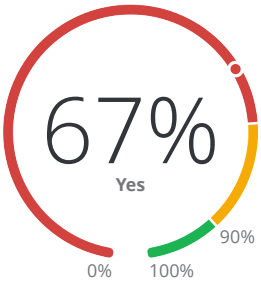
Oversight Practices include policies and procedures related to financial oversight and compliance.

Board Practices address issues related to board orientation, term limits, retreats, and committees.

Chief Executive Supervision Practices cover the support and supervision of the highest paid staff person.

Organizational Practices

% of organizational practices in place:

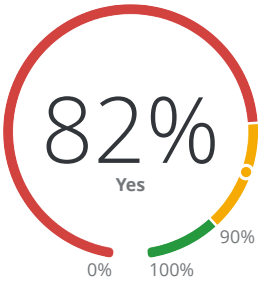


Benchmark: % of boards that have each policy in place:

CLP. Org Practices	YES
CLP.01 Written mission statement	99%
CLP.02 Written vision statement	84%
CLP.03 Written code of ethics	71%
CLP.04 Clearly defined and documented approach to organizational strategy	68%
CLP.05 Has the organization completed the board leadership practices section of its GuideStar profile	30%
CLP.06 Has the organization completed the board and staff demographics section of its GuideStar profile	30%

Oversight Practices

% of oversight practices in place

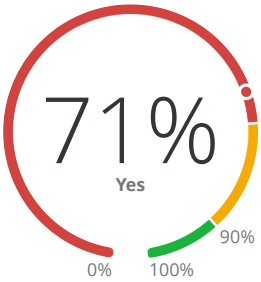


Benchmark: % of boards that have each policy in place:

CLP. Oversight Practices	YES
CLP.07 Did the full board formally approve the organization's annual budget?	97%
CLP.08 Does the full board receive financial reports at least quarterly?	94%
CLP.09 Within the past year, has the organization obtained a formal independent audit?	91%
CLP.10 Did the board, or a committee of the board, meet with the auditors without staff present? (Select NA if there is no independent audit.)	59%
CLP.11 Did all board members receive a copy of the organization's IRS Form 990?	76%
CLP.12 Does the organization post the most current financial documents, such as annual reports and audited financial statements, on its website?	56%
CLP.13 Does the organization have a whistleblower policy that incorporates a reporting avenue outside of the executive in case of suspected illegal activities?	81%
CLP.14 Does the organization have a document retention and destruction policy?	76%
CLP.15 Does the organization carry adequate directors' and officers' liability insurance?	94%
CLP.16 Does the organization have a written conflict-of-interest policy?	97%
CLP.17 Have all current board members and senior staff signed a conflict-of-interest and annual disclosure statement?	75%

Board Practices

% of oversight practices in place:

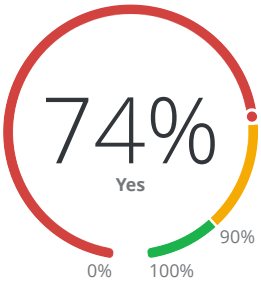


Benchmark: % of boards that have each policy in place:

CLP. Board Practices	YES
CLP.18 Is a structured, formal orientation held for new board members?	72%
CLP.19 Is the length of board member terms defined?	93%
CLP.20 Is there a maximum number of consecutive years a board member can serve?	75%
CLP.21 Does the board have an annual retreat?	47%
CLP.22 Do board committees have written charters or job descriptions?	75%
CLP.23 Is there a written policy specifying the executive committee's roles and powers? (Select NA if the board does not have an executive committee.)	67%
CLP.24 As the chief executive, are you a member of the board – either voting or non-voting?	61%
CLP.24B As the chief executive, are you excluded from participating in board votes?	74%

Chief Executive Supervision Practices

% of CEO supervision practices in place:



Benchmark: % of boards that have each policy in place:

CLP. CEO Supervision	YES
CLP.25 Does the chief executive have a written job description?	91%
CLP.26 Is the chief executive's performance evaluated annually by the board?	79%
CLP.27 Does the evaluation of the chief executive include a formal, written review?	68%
CLP.28 Does the annual evaluation of the chief executive include setting mutually agreed upon performance goals?	69%
CLP.29 Does the board periodically review chief executive compensation at comparable organizations?	62%

Board Information

CLP.30 How many voting members currently serve on the board?

Average

16

CLP.31 How many times did your full board meet during the past 12 months?

Average

7

CLP.32 How many hours does a typical board meeting last?

Average

3.8

CLP.33 During the past year, on average, what percent of the board attended meetings?

Average

79

CLP.34 What percent of board members made a financial contribution last year?

Average

72

CLP.35 How many committees does your board have?

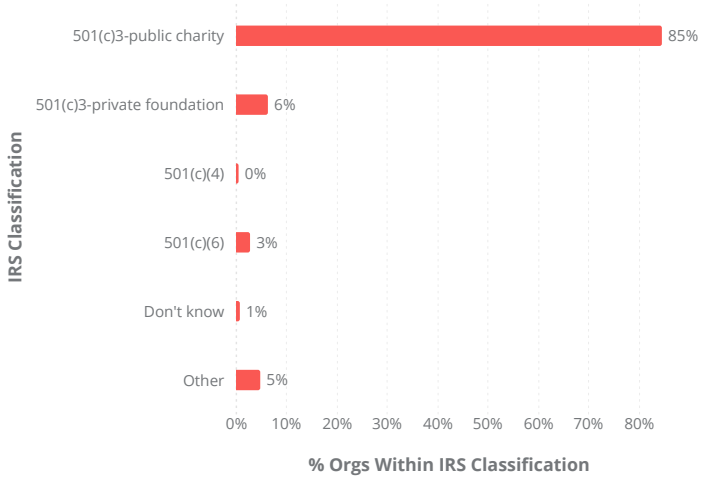
Average

5

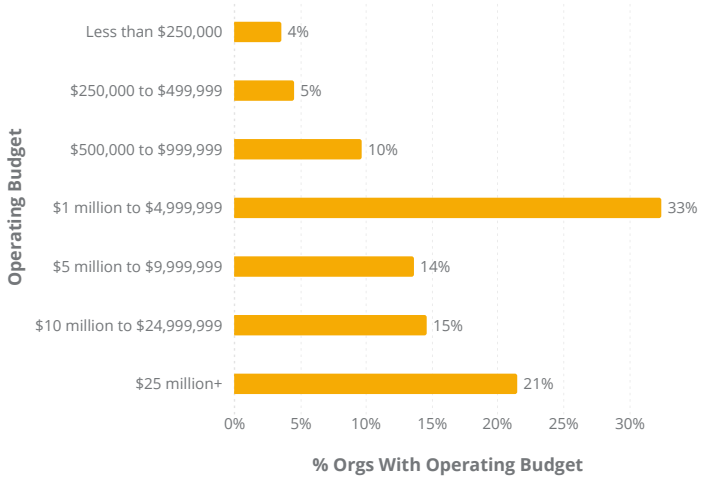
Organizational Demographics

(Reported data reflects responses by Chief Executives who completed the Checklist of Practices section of questions)

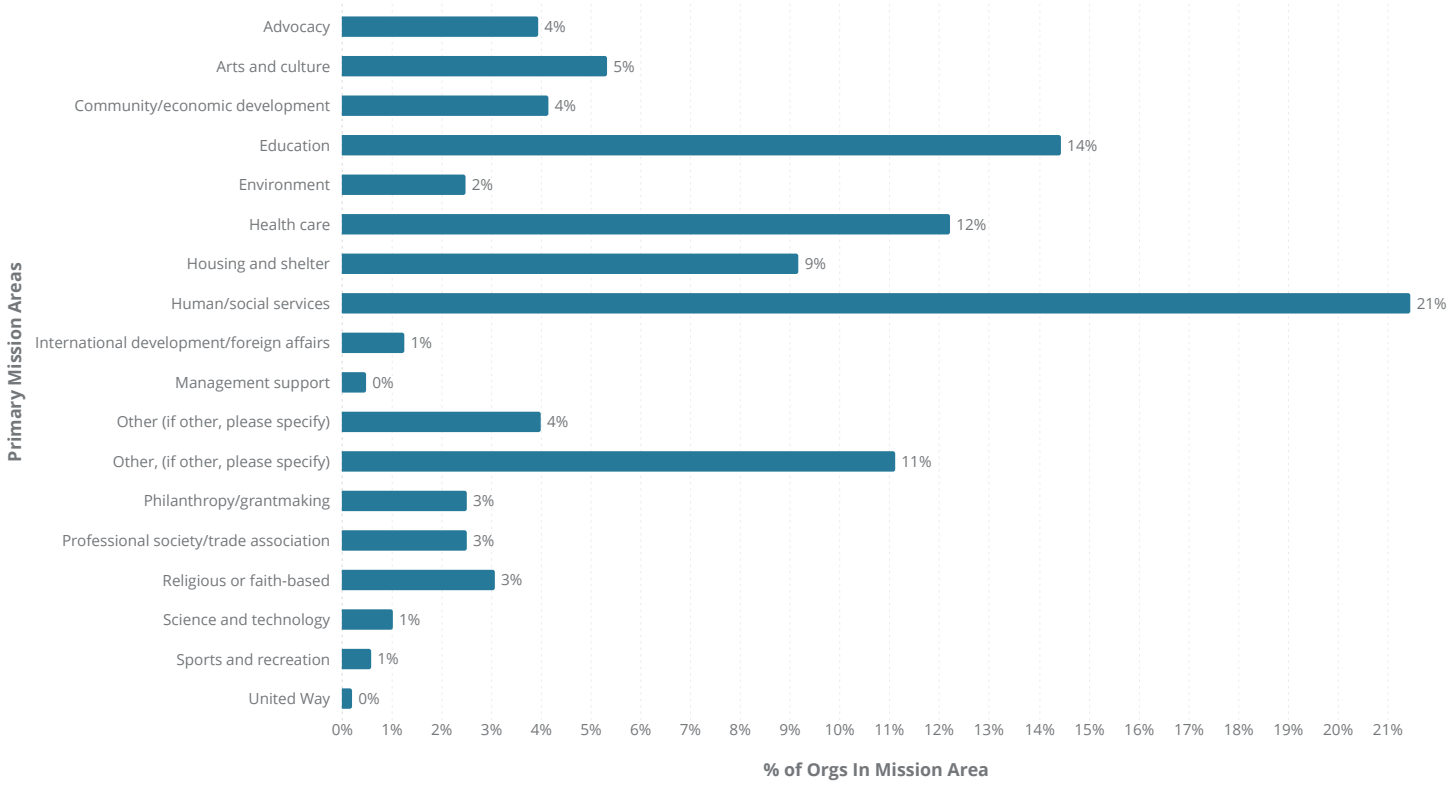
IRS Classification 2,844

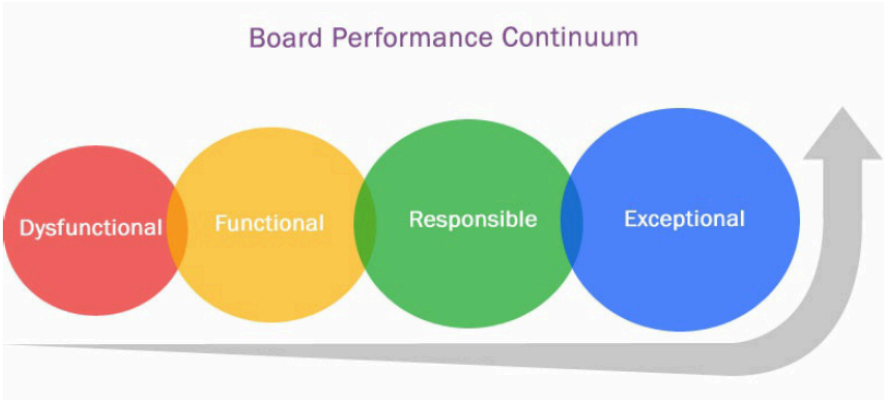


Operating Budget 2,818



Organization's Primary Mission Area 2,859





Taking Actions

Exceptional boards are a strategic asset to be leveraged by the organization. They add significant value and make a discernible difference in the organization's advancement of mission. Use this report as a tool to guide your board on the path to exceptional performance.

Take action. The board self-assessment establishes a platform for setting board priorities. The final step is identifying areas for growth. To help your board do this, consider the following questions:

1. What stands out? Is there anything in the report that is especially surprising, or that you'd like to understand better through conversations as a full board?
2. Does the board seem to be well aligned in terms of its assessment of its performance, or are there indications that different board members are experiencing the board's leadership performance differently? If the latter, why might that be?
3. To what extent is your board meeting its own expectations? In what ways is the board happy with its leadership performance, and where is it signaling a desire to improve? Do any natural priorities emerge from the ratings?
4. Based on what you see in the self-assessment, what are the top one to three areas where you think the board should focus its board development efforts?

Develop a board action plan. Once the board has agreed on its priorities, use a board action plan to help the board develop a clear approach to achieving its goals and staying accountable.

1. What steps can we take to ensure that information from the evaluation is used to improve the performance of the board?
2. Who or what committee is responsible for initiating and leading board development and assessment? Does it have the necessary resources and authority to fulfill its responsibilities?
3. Every board should have clearly established guidelines that outline the duties and responsibilities of individual board members. Are our board members held accountable to these standards? Do we have a process for removing nonperforming board members?

Check your progress. Only the board can hold itself accountable for its own performance. Periodically revisit the results from the self-assessment and action plan, celebrate the successes, and recommit to those areas that need further attention.

Repeat. BoardSource recommends conducting a thorough board self-assessment every two to three years and using the intervening time to work on the action plan you develop.

Deeper Support

Looking to go deeper? Consider investing in the Board Support Program, or reaching out to a consultant from our network.

Board Support Program

BoardSource's Board Support Program provides year-round governance guidance, resources, and leadership development to you, your board, and your organization.

Key benefits include:

- Complimentary Assessment Product
- Access to the BoardSource Exchange
- On-demand Certificate of Nonprofit Board Education
- Ask-an-Expert Email Service
- Members-Only Downloadable & Written Resources

Consultant Directory

BoardSource knows that – many times – there is no replacement for direct support and guidance from a knowledgeable board consultant. That's why BoardSource has built relationships with a broad network of consultants from across the country who bring a wide range of strengths and experiences working with nonprofit boards.

New to selecting a consultant, or need a little help getting started? Check out this resource page:
Choosing a Consultant FAQ

Contact Us

Assessments Questions: assessments@boardsource.org
Membership or General Inquiries: members@boardsource.org

About BoardSource

About Us

BoardSource envisions a future where the nonprofit community has the leadership to fulfill its purpose and create a just world where all can thrive. Our mission is to inspire and support nonprofit boards and executives to lead justly and with purpose.

Established in 1988, BoardSource's work is grounded in the fundamental belief that boards are critical to organizational success. With decades of hands-on experience working with and supporting nonprofit boards, BoardSource is a go-to resource for nonprofit board and executive leaders. BoardSource supports a broad and diverse cross-section of social sector organizations with

- leadership initiatives addressing key opportunities and issues within the nonprofit sector
- research and benchmarking of board composition, practices, and performance
- membership and board support programs
- performance assessment tools
- a comprehensive library of topic papers, publications, and downloadable infographics, tools, templates and more
- live and virtual education and training

A note to our global readers

The need for effective board leadership and governance knows no geographic boundaries, and BoardSource is committed to strong social sector board leadership and governance around the globe. While BoardSource uses United States laws and policies as the legal framework for our resources and recommendations, most of our resources do not focus on legal matters but rather on good governance practices, making them relevant to organizations working outside of the United States. We do suggest, however, that you refer to applicable laws in your country regarding financial reporting and other legal and transparency issues.

BoardSource is a 501(c)(3) organization.

For more information, please visit our website at www.boardsource.org, e-mail us at mail@boardsource.org, or call us at 800-883-6262.