



BSA:

COMMUNITY FOUNDATIONS

BOARD SELF-ASSESSMENT

Welcome

Welcome to the BoardSource Board Self-Assessment for Community Foundations (BSA) Report. The BSA is designed to educate and provide insights on your board's governance performance, which will enable your board to operate at the highest and best use of its collective capacity. BoardSource recommends that community foundations engage in a self-assessment process every two to three years.

This report provides an overview of your board's performance based on recognized nonprofit governance roles and responsibilities, as outlined in *Ten Basic Responsibilities of Nonprofit Boards*. The report compiles data that reflect how well the board and the chief executive think they are meeting their responsibilities in four key areas identified by BoardSource as crucial for high-performing boards and organizational success: setting direction, ensuring resources, providing oversight, and board structure and operations.

The report is intended to help your board determine its strengths and identify opportunities for board development. We encourage you to use the report

- as a starting point for discussions to identify gaps between expected and actual performance
- a basis for establishing a shared understanding of the board's roles and responsibilities
- provide context for creating a board development action plan
- enhance credibility for the community foundation among staff, volunteers, donors, and other constituencies

Additionally, this report benchmarks your data against other community foundations that have answered the same questions. By comparing your performance as a governing body against that of your peers, you will be able to clarify areas where your performance differs from that of your peers. Please use this data as one point of reference within the context and history of your community foundation to help you focus on your strengths and identify those areas in need of improvement.

As the preeminent organization focused on nonprofit governance, BoardSource is here to help with all of your governance needs. Information about our resources and services can be found in this report, on our website, or you can e-mail us at members@boardsource.org. Congratulations on taking such an important step!

Sincerely,



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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 a 5-point scale using the following definitions:

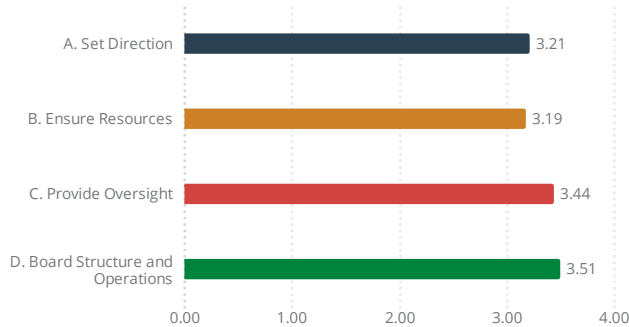
0 = Poor or needs improvement; 1 = Fair or marginal; 2 = OK or acceptable; 3 = Good or above average; 4 = Excellent or superior.

As an important note, respondents to the survey have the option to select NA/Don't Know to questions within the survey. Responses of NA/Don't Know are excluded from analysis within the final report and are not included in the averages provided. Responses of NA/Don't Know are also excluded from the total response count for that question.

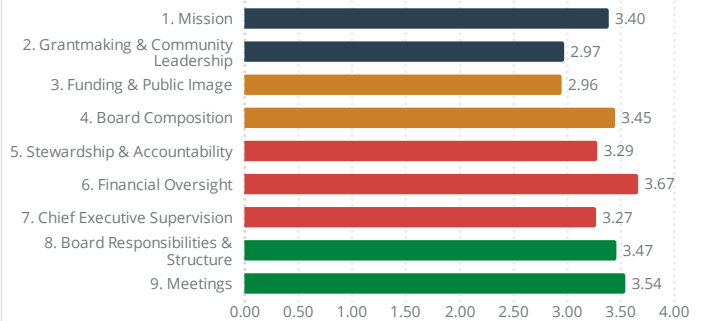
Roles and Responsibilities Overview

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.

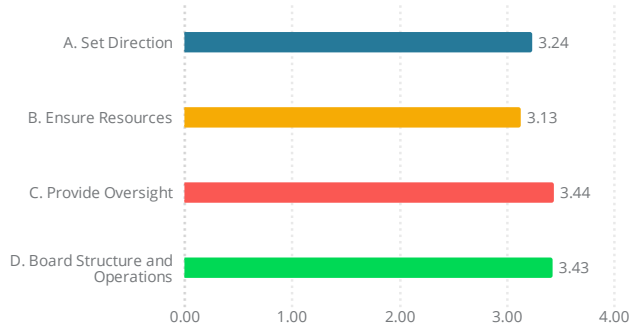
Your Board's Role Scores



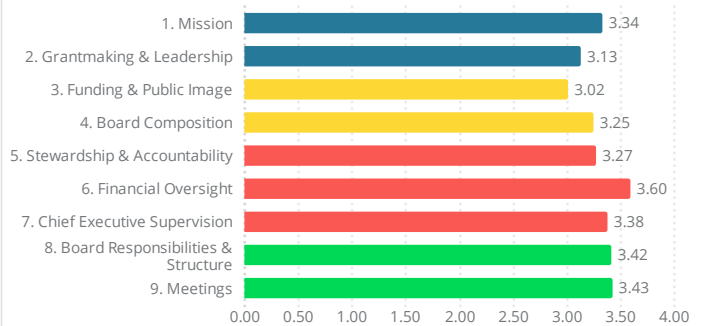
Your Board's Responsibility Scores



All Boards Average Role Scores



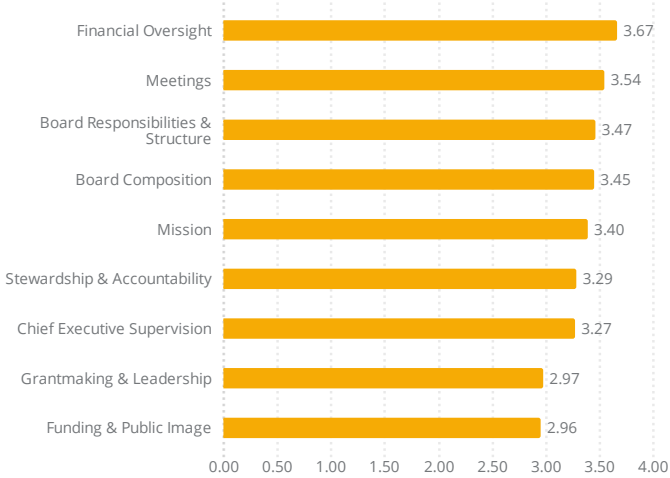
All Boards Average Responsibility Scores



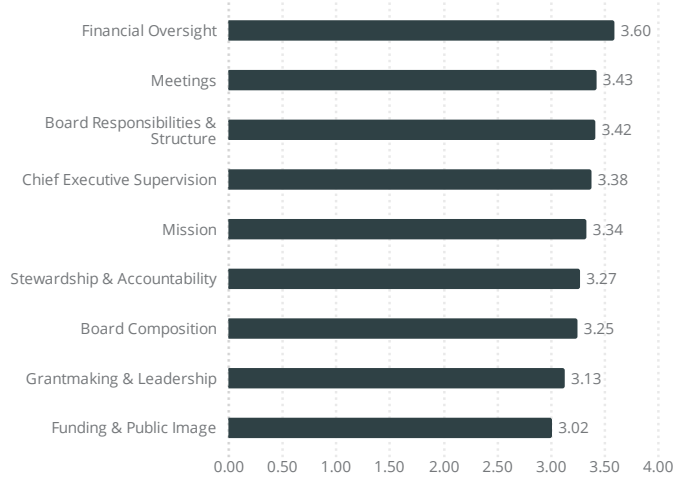
Highest to Lowest Ranked Responsibilities

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



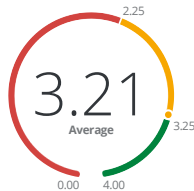
All Boards



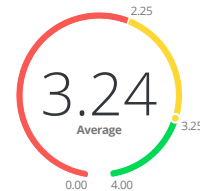
A | Set Direction

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.

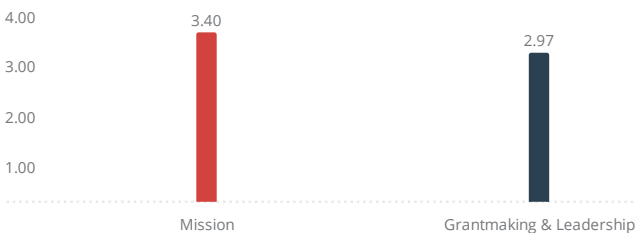
A | Set Direction Role Score - Your Board



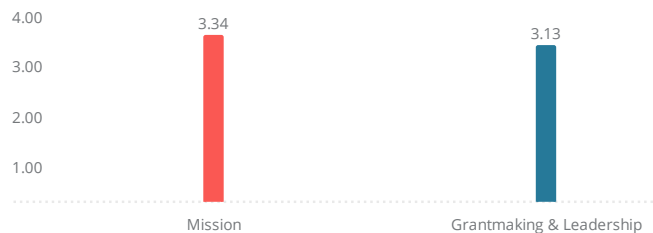
A | Set Direction Role Score - All Boards



A | Set Direction Responsibility Scores - Your Board



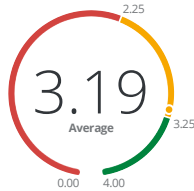
A | Set Direction Responsibility Scores - All Boards



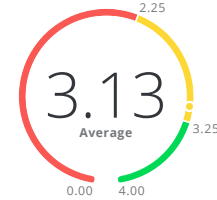
B | Ensure Resources

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.

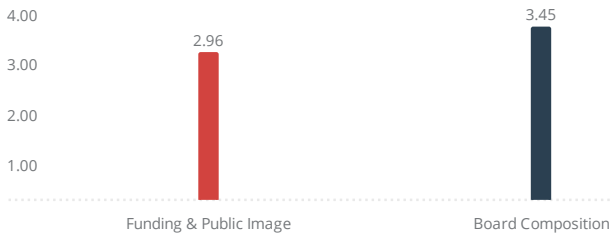
B | Ensure Resources Role Score - Your Board



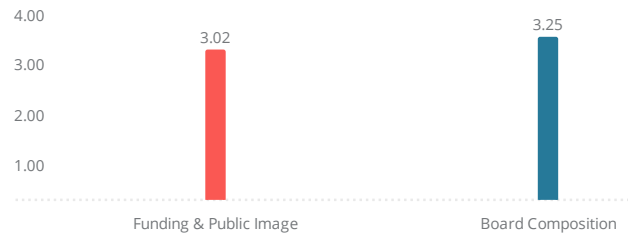
B | Ensure Resources Role Score - All Boards ∇



B | Ensure Resources Responsibility Scores - Your Board



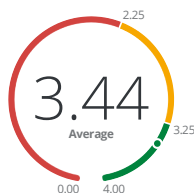
B | Ensure Resources Responsibility Scores - All Boards ∇



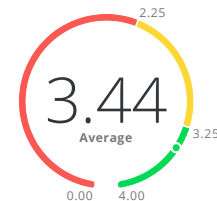
C | Provide Oversight

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.

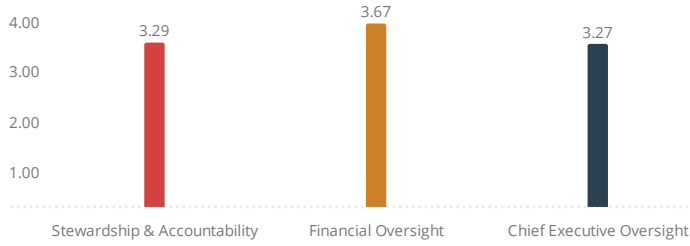
C | Provide Oversight Role Score - Your Board



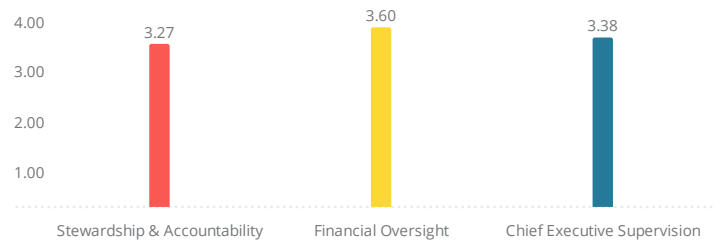
C | Provide Oversight Role Score - All Boards ∇



C | Provide Oversight Responsibility Scores - Your Board



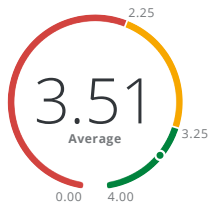
C | Provide Oversight Responsibility Scores - All Boards



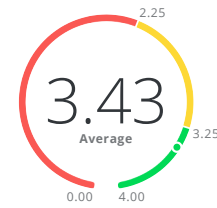
D | Board Structure and Operations

A well-functioning board is a strategic resource for the organization. A board that attends to the quality of its performance will serve the community foundation and its constituencies well. Among the factors that go into functioning effectively are board size and composition, clarity of roles and responsibilities, productive meetings, well-functioning committees, access to necessary information, and use of a team approach.

D | Board Structure and Operations Role Score - Your Board



D | Board Structure and Operations Role Score - All Boards



D | Board Structure and Operations Responsibility Scores - Your Board



D | Board Structure and Operations Responsibility Scores - All Boards

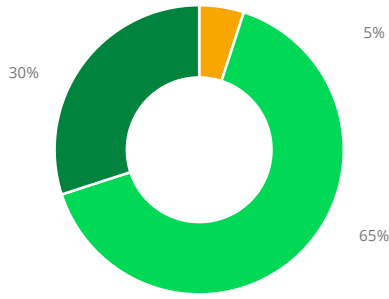


Board Service Experience

Overall Effectiveness

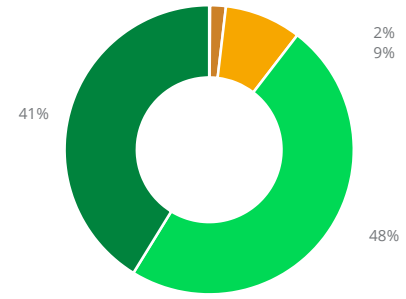
The following graphs reflect the board's thinking about its overall effectiveness. Because the percentages are based on the perceptions of your individual board members, this information can be used to spark a full board discussion on whether the members feel they are collectively meeting their responsibilities.

Your Board



Neutral Satisfied Very Satisfied

All Boards

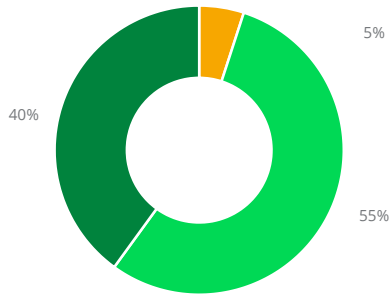


Very Dissatisfied Dissatisfied Neutral Satisfied Very Satisfied

Level of Commitment and Involvement

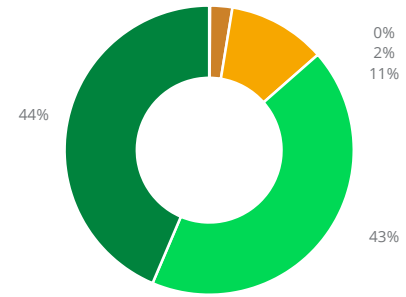
The board self-assessment survey asks board members to identify their fellow board members' level of commitment and involvement, typically described as board engagement. Engaged board members make it a priority to attend and participate in all board meetings, take initiative, and jump into action when 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



Neutral Satisfied Very Satisfied

All Boards



Very Dissatisfied Dissatisfied Neutral Satisfied Very Satisfied

Individual Board Member Experience

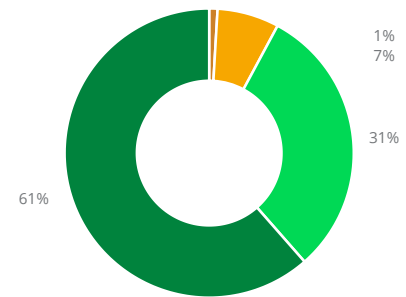
Individuals serve on nonprofit boards for a variety of reasons. The percentages in this graph provide an overall sense of whether your individual board members feel that they have adequate opportunities to use their time, talent, and expertise to advance the mission of your community foundation.

Your Board



Neutral Satisfying Very Satisfying

All Boards



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?

1. need a stronger development effort
2. understanding and confirming the opportunities with NMCT

Support Marisa as she transitions into the CEO role by being clear on expectations
Improve our ability to guide and direct without bias - allowing personal relationships of the past or present to get in the way of positive progress

-
1. Allowing the board members to build genuine connections with one another. We'll need these connections as we work to support the new CEO and need to understand unique perspectives, view points in the event that hard or difficult topics emerge.
 2. Ensuring the committees of the board have the right members to ensure they are balanced, offer various viewpoints, and function to benefit the full board.
 3. With the incoming CEO, it would be helpful for the board to define success for this position and ways in which success will be measured.

1) Concentrate on supporting the new CEO through her transition to ensure board-backed success across the community. 2) Engage in a capital campaign to increase capacity to serve the community and other orgs during a time of diminished federal funding. 3) Be more intentional about transparency and pan-board collaboration on important issues (especially the selection of new trustees).

Clear strategy
Fund raising strategy
Clear CEO expectations

-
- 1) Closely monitoring the CEO transition process/support/outward-perspective
 - 2) Taking it to the next level for NMCT

Support the new CEO with active involvement

Effectively supporting CEO transition. Community engagement around the transition.

Open and frank discussions in executive session about issues.
Continued discussion of how to accomplish mission in spite of political absurdity.
Meet as often as necessary to do what needs to be done...

Revisiting and developing strategic plan for endowment growth.

Continued growth of NMCT and plan to reach out of the ABQ Metro Area

-
1. support our new CEO should be top of mind for board.

Continue to support Marisa as the incoming CEO. I want her to feel full support and engagement from the Board.

With the new signature event, I also want to ensure community is engaged and that the Board can adequately represent the intent and goals of the event.

I think we need to both be grounded in where we are and having a strong foundation while also not being scared to take big swings with the new ideas of the incoming CEO.

The Board should get back to the business of governing an active community foundation. This foundation has, in general, been on hold for 5 years. We need to be a foundation which is actively working for our community.

Let's take a closer look at how we are building our donor base. And on the other end, let's review how we inform our board more thoroughly about our grant recipients.

Update and/or revision to our mission vision and values statement. Establishing a clear master plan for endowment growth. Support and establishing clear direction for Marisa through the transition period with Randy.

Unified support for our new CEO
Simplified and clear direction/expectations/goals for the organization and our new CEO

Clarify and solidify the ACF/NMCT alignment and structure. Build the endowment. Set clear targets for fee for service work that generates unrestricted income to support operations,

Seek training for CEO internal and external.

Fundraising
Community Involvement

What organizational issues or challenges require strategic direction or guidance from the board?

1. appropriate staffing given growth opportunities
 2. continue to build relationships with city leaders
-

CEO evaluation that is objective and connected to goal attainment.
Alignment on donor relationships and retention strategies
Alignment on strategic goals - endowment growth goals, donor solicitation practices/service, community engagement.
NMCT overlaps

Reviewing the endowment growth plan and strategic direction behind its growth. Additionally, ensuring the organizational structure is adequate and aligned to meet the strategic direction with a players in their place.

- 1) Whether to engage in a planned giving / capital campaign at some point in the near future.
 - 2) Whether to focus the organization topically on particular issues for the year, or allow staff to flex to needs that arise.
 - 3) How board officership and leadership roles are selected and divvied up.
-

Strategy
Donor relationships

The community perspective of the CEO transition. It is our role to make sure that our new CEO is well-received and embraced by community and stakeholders.

Policy to protect and support change in donor advised funds direction.

Making sure the team remains engaged with the Community Foundation through the transition.

Ensure CEO has adequate resources to build appropriate staff.
Ensure CEO knows that she has backing of Board to guide the Foundation

Plan for the CEO transition

Help new CEO to identify staffing needs and align with budget

Executing on the new signature event.

Ensuring proper succession planning is in place as we bring a new CEO on board.

I do not know of any at this time.

We need to govern soundly with our new CEO and help her understand we expect action and progress. We should not continue to tolerate platitudes and inaction.

Identify areas that our new CEO wants to improve. Help us understand where she thinks we are most challenged.

What organizational structure will best support our new CEO in achieving our goals.

Clear understanding of board vs. staff roles

The transition

NMCT + ACF Clarity

The CEO transition. The board needs to be fully supportive of the new CEO being able to boldly lead the foundation without being in the shadow of the previous CEO.

Public Relations is silent...most do not know ACF or what they do.

The board will need to support the success of the new CEO

What other comments or suggestions would you like to offer?

1. we need to have an open mind during this time of transition, particularly with regard to changing and improving the way we do business.

Please keep in mind that as board members, we're also busy professionals (not all of us are retired) and we may not have time for another meeting, attend an event, etc. It would be nice for us to think of other ways to engage.

The board needs to create a framework to fully support the new CEO

I'm truly honored to serve as a trustee and am always available and open to feedback on how I can be more effective and impactful.

Periodically rotate the executive committee members

Ongoing community engagement around our policies. Specifically our commitment to DEI.

I'm pleased to be a part of this Board-after serving on various committees for a number of years it is great to be on the Board. I'm a big believer in open communication between Board members and that frank and open discussions should play a big part in developing Board direction.

none noted

Looking forward to our next chapter with our new CEO.

Excited to move through this transition so that we can focus on our community and the impact of the foundation!

The CEO transition is one of the most important things we are doing right now. We need all trustees stand behind not just the transition of role and title to the new CEO, but also the transition of authority, leadership style, and vision to the new CEO. It will be very easy to unintentionally undermine the new CEO's leadership through back channeling and conversations in the community. It is my hope that the trustees will stand strong behind our unanimous decision for the new CEO and provide supportive accountability to do what is best for the new CEO.

A | Setting Direction

(includes Mission and Grantmaking & Leadership)

A community foundation is a public charity with a commitment to serve a specific geographic area. It is uniquely positioned to lead community-wide efforts in its role as grantmaker for local projects, but it goes beyond simply making grants that advance charitable activities. It also identifies current and emerging issues, channels resources to address its community's needs, and helps the community prepare for the future. Bringing together individuals and organizations that share a common interest, it may lead and operate its own programs and initiatives to serve the community. It encourages and promotes individual and corporate philanthropy by managing donor-advised funds. Dedicated to improving the quality of life in its area, a community foundation effectively invests in the future of its community by creating permanent charitable funds to help its region meet the challenges of changing times.

Strengthen Performance through Action

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

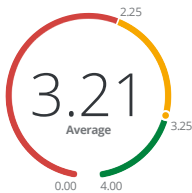
Recommended Resources - Mission and Vision

- Book: [The Nonprofit Board's Role in Mission, Planning, and Evaluation](#)
- Free Community Resource: [Tips for Developing a Mission Statement](#)
- Free Community Resource: [Mission Statement vs. Vision Statement](#)

Recommended Resources - Strategy

- Guide: [Shaping the Future of Your Organization: A Strategic Planning Guide for Nonprofit Leaders](#)
- Free Community Resource: [Nonprofit Strategy By the Numbers: Evolution and Progress](#)
- Free Community Resource: [Charting a New Path Forward: Insights & Reflections from BoardSource's Strategic Planning Efforts](#)

Your Setting Direction Role Score



Your role score is based on the following responsibility scores:

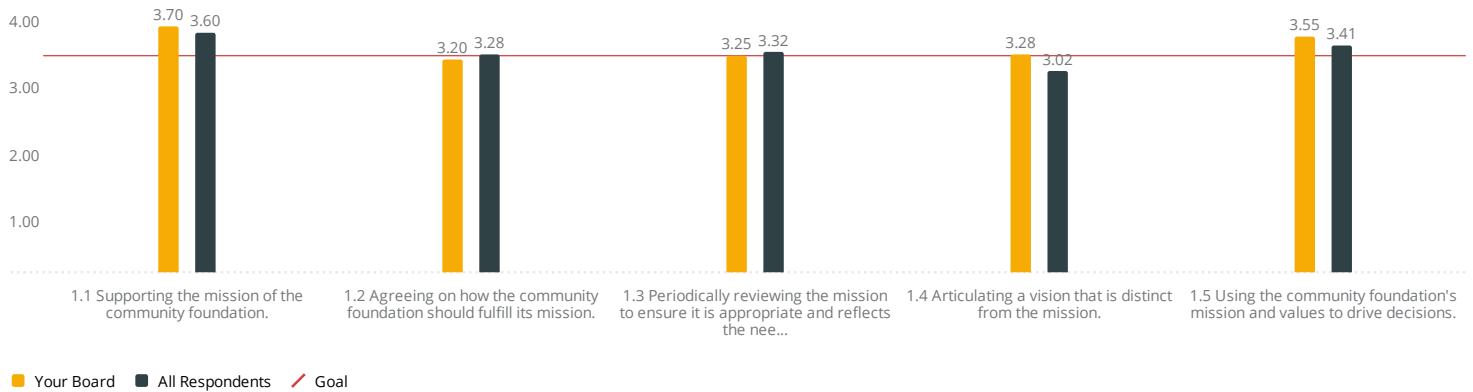


Mission | Section Detail

One of 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...)



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?

New CEO will bring fresh strategies and fresh enthusiasm.

I feel that this has been driven mostly from the CEO/Senior leadership with input from the board. With its most recent revision it has been supported. At times tenured board members revert to the prior version or continue to press in areas that have since evolved which is hard on the staff to continue to move forward.

By referencing the mission or vision when making decisions, changing course, or taking action. Not just saying "this is tied to our mission", but by giving specific examples of how or which part of the mission or vision that we are referencing.

It may be that the board is otherwise excellent in this area, but that this year has been irregular due to the CEO search taking time and resources.

Review the mission more often through the lens of decisions.

Actionable practice of values established in the strategic plan

I believe the Board does do an excellent job of fulfilling its mission. I believe that in this particular era of political absurdness we need to continue to do what we feel best without labels.

In my 8 months on the Board, most of our work has been centered around the CEO search and other matters with Donor relations. Most of the meetings have centered around this.

I think we spend more time as a Board on getting report outs rather than making decisions and/or reviewing the mission. I would like to have more connection on bringing the community into alignment with the mission and vision of ACF.

This entire organization needs to stop and reassess exactly what it is, and what it should be doing. ACF does not exist to raise funds to support staff. ACF should exist to be a catalyst to spark innovation and growth in our community.

From time to time, asking board members, "How are we doing" when it comes to our mission and vision.

Be very transparent about reevaluating the mission and vision in 2026

Discuss mission and vision more regularly

The board is continuing to shift toward expanding from donor-centered priorities to community-driven priorities and needs. Continuing that expansive approach to implementing our mission through programs and initiatives is critical to moving toward the vision for our community. We are well on our way.

review vision and mission at each meeting

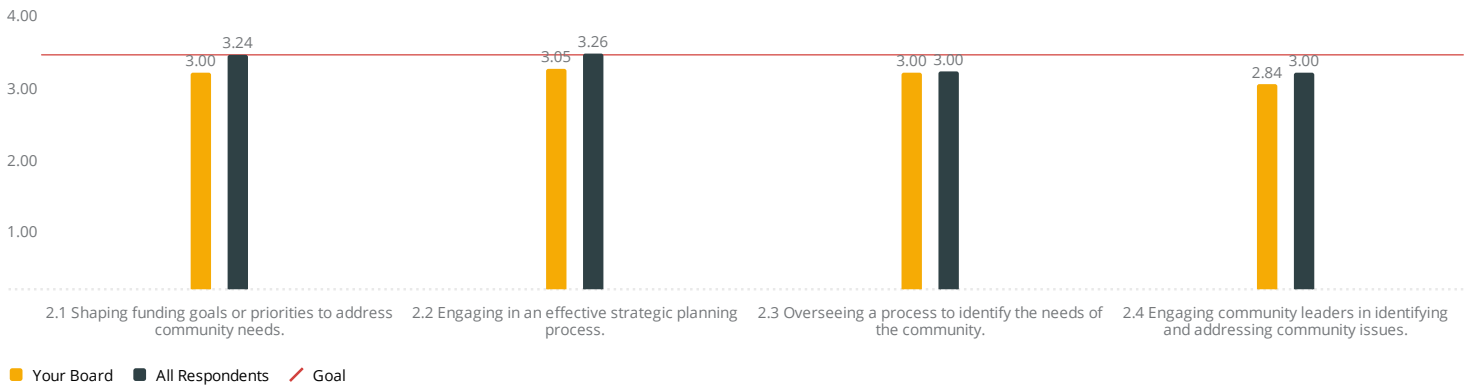
In this fast-paced changing environment, the board needs to be a good steward of monitoring the community needs to assure that we are remaining aligned.

Assuring that we are always challenging ourselves and the staff to demonstrate our decisions link to our mission and values.

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.

Average Score

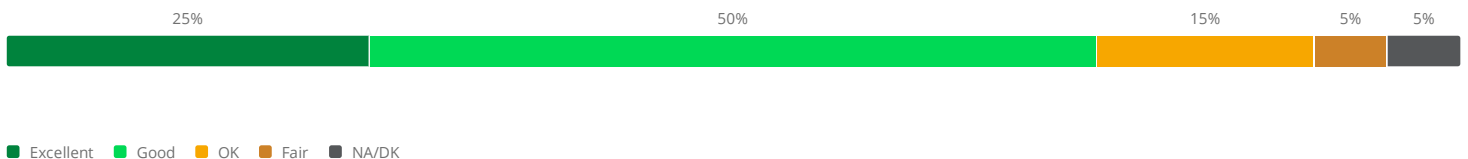


Question Breakdowns

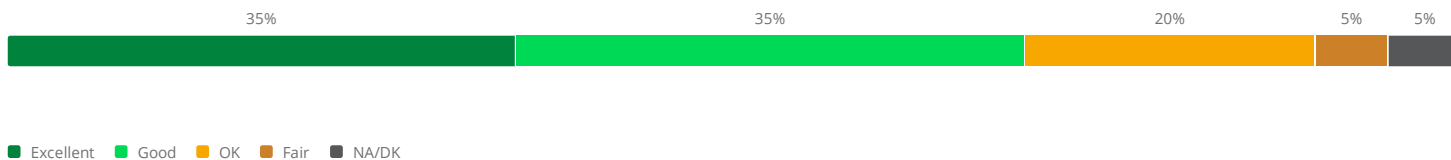
(Please rate the board's performance in...)

Excellent Good Ok Fair Poor NA / Don't Know

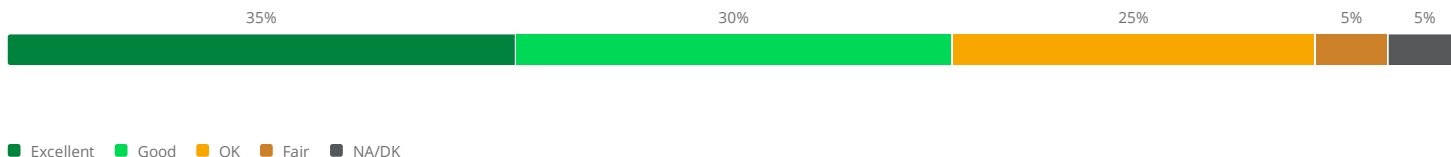
2.1 Shaping funding goals or priorities to address community needs.



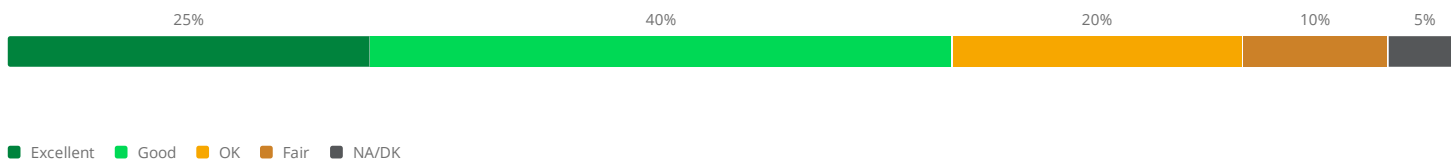
2.2 Engaging in an effective strategic planning process.



2.3 Overseeing a process to identify the needs of the community.



2.4 Engaging community leaders in identifying and addressing community issues.



How can the board improve its performance in this area?

Align on what growth looks like, participate in hard conversations when they have strong opinions, find ways to engage with the community beyond donors so we advocate for various perspectives and outcomes.

As a board, we've trusted that the executive team has shaped their priorities around the needs of the community. We could do a better job in reviewing data, maybe on a bi-annual basis, on the key priorities to ensure that they still should remain key priorities. We also need to know how we're moving the needle, what is the measurable impact that we're having--- not just in grant making, but in specific areas that we can show impact.

I don't think the board in this organization shapes funding goals and priorities, but rather leaves that to staff. In committee work, such as community impact and impact investing, board members who are committee members may do more to shape funding goals and priorities. But the Board has certainly played its part in this wicket by advancing work with NMCT and such, which is laudable.

I was not around for the last strategic planning process and can't answer this question. But I know preparations are being made for the coming strategic planning round in the coming year.

Re 2.3 and 2.4, I don't get the impression that the board in this organization engages in either of these tasks. Instead, these tasks are trusted to staff.

The board in whole does not get a lot of information about the community engagement. It seems to flow through committee, but discussions are not held in board meetings

This area of planning and engaging may be strong, but if so, it isn't communicated effectively to the board.

Participate in grant making for at least 2 years of the 9 year service

Bring community leaders together to discuss these issues.

In my 8 months on the Board, most of our work has been centered around the CEO search and other matters with Donor relations. Most of the meetings have centered around this.

As a Board, it would be helpful to have community leaders come speak to us and hear more about partnerships with ACF and how those partnerships are working together to address community issues.

I feel like most of these discussions happen in a committee vs discussions within the whole group.

Set a cadence for review of what the community needs based on staff NP and community input.

More outreach/network integration perhaps

I know that this engagement happens but I am not clear about how community leaders are engaged. We could use a consistent crosswalk between community issues and needs and funding alignment. A clear process for this would be helpful.

NMCT and ACF may have different approaches and clients...we should discuss

Because so much of this work is done in committee meetings, I'm not aware of the detailed work being done.

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.

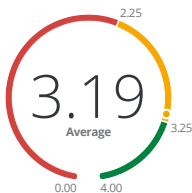
Recommended Resources - Funding and Public Image

- 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



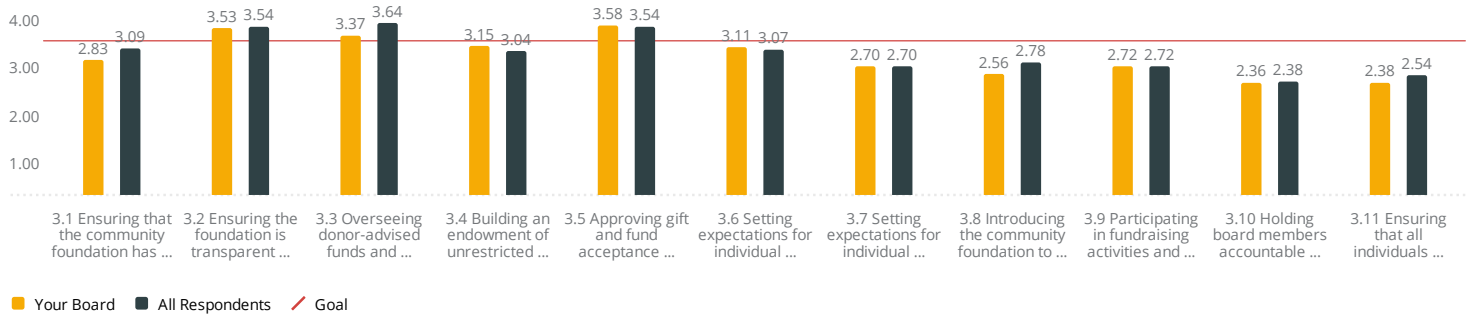
Your role score is based on the following responsibility scores:



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

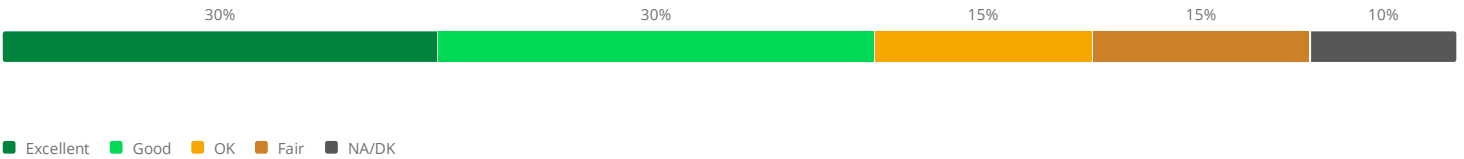


Question Breakdowns

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



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



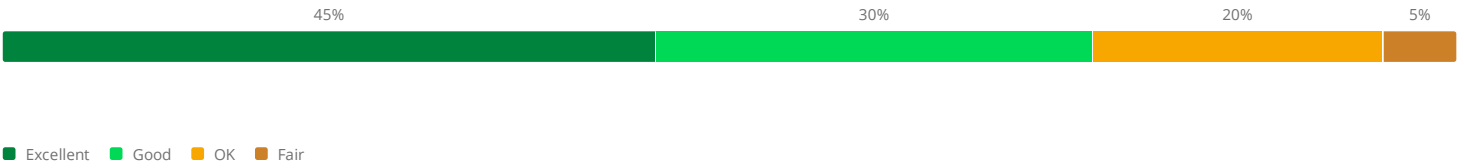
3.2 Ensuring the foundation is transparent and accountable to the community by regularly disseminating information on finances and grant awards.



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



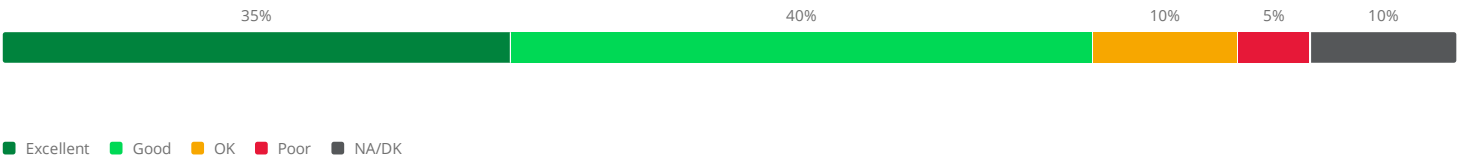
3.4 Building an endowment of unrestricted funds for discretionary grantmaking and/or operating expenses.



3.5 Approving gift and fund acceptance policies that address the purpose and use of funds.



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



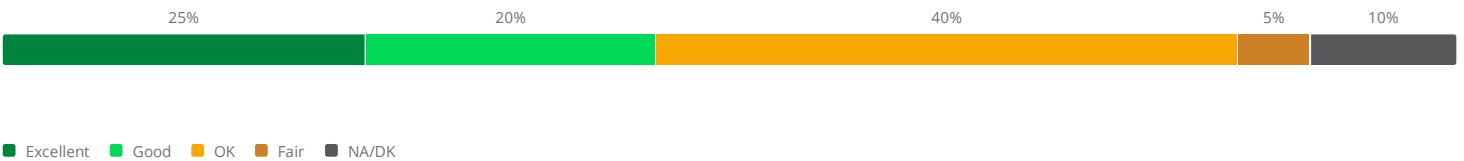
3.7 Setting expectations for individual board members to participate in fundraising activities and solicitations.



3.8 Introducing the community foundation to potential donors.



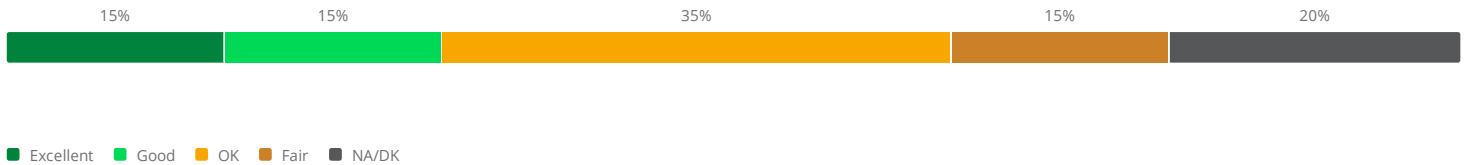
3.9 Participating in fundraising activities and solicitations.



3.10 Holding board members accountable for fulfilling their fundraising responsibilities.



3.11 Ensuring that all individuals involved in fundraising understand the legal issues related to fundraising.



How can the board improve its performance in this area?

The board doesn't appear to have processes or expectations clearly outlined to hold ourselves accountable to questions in this section, and the foundation has not engaged in hard asks. It's been a few years since we've been asked to submit names of contacts for donor or advisor relationships.

As a board, we should set clear and achievable goals for our membership around fundraising, making connections, and attending events or sponsorships. This should also feel fun, rewarding and give the board member options so it doesn't feel high pressure. Some board members may bring different talents to the board so this should also be taken into consideration and maybe other ways to give or encourage others to give would be a good option.

Include fundraising updates in board meetings — celebrate wins, recognize effort, and track progress toward goals. Share stories of impact to get our board excited about giving or supporting initiative's that they may be personally interested in.

3.1 - I have not been involved in conversations about strategic fundraising or capital campaigns. I understand a recent (some years ago) conversation about a capital campaign ended up with the idea temporarily shelved, but that the discussion may arise again soon.

3.6 - expectations are clear, but I'm not sure that flat dollar amounts account for trustee strengths that could be recruited to the board.

3.8 - relatedly, not every trustee is a member of the board for purposes of raising dollars, and the foundation doesn't push its trustees to introduce staff to potential donors. While donors are essential, this strikes me as a positive attribute.

3.10 - because there are not concrete fundraising responsibilities, this is not applicable.

3.11 - I am not on the donor development committee and cannot speak to this task.

Have a transparent discussion about expectations.

The Board should must always strive to support and align donor's funding preferences with appropriate charitable organizations

Not yet familiar with most of these issues.

As part of the Investment Committee, I have seen some of this in action.

I would like to have more of a direct ask in how the Board can support fundraising activities and build relationships with donors. Maybe this comes in the form of giving circles and attending those events?

We discuss fundraising and donor relations often, as we should.

We should revisit the board member commitment matrix that was put together earlier this year. We haven't had time with the transition to get back to it, but I thought it was a great start. Now we just need followup.

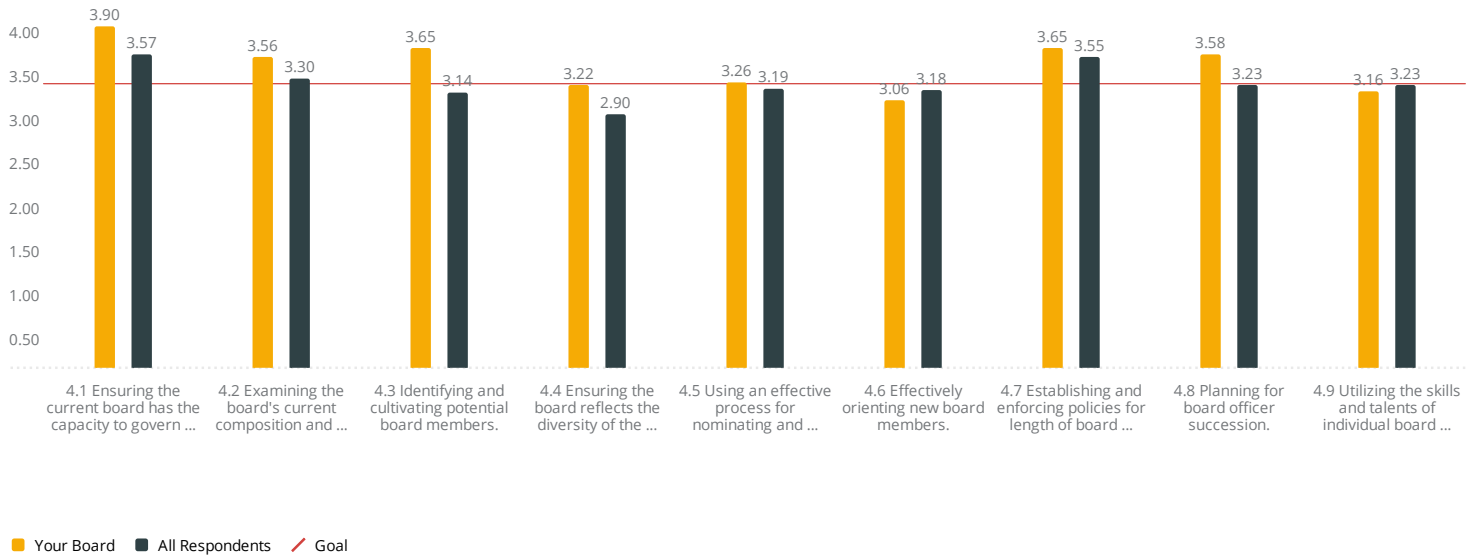
internal funds should be collected, friend/family is low hanging fruit....much more broad funding should be sought

It is my impression that there are a few people on the board who are involved in Fundraising and Public Image, a better job can be done to make it a team effort and involve all board members.

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

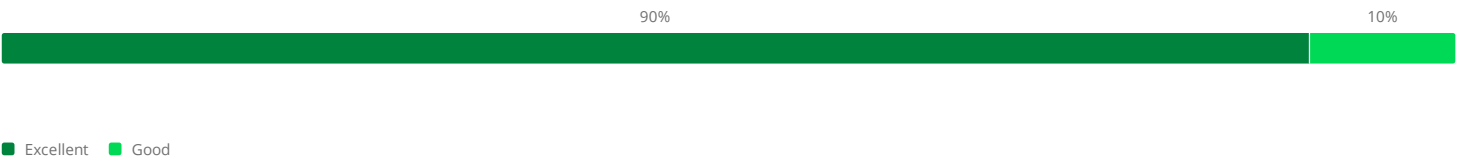


Question Breakdowns

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

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

4.1 Ensuring the current board has the capacity to govern the community foundation.



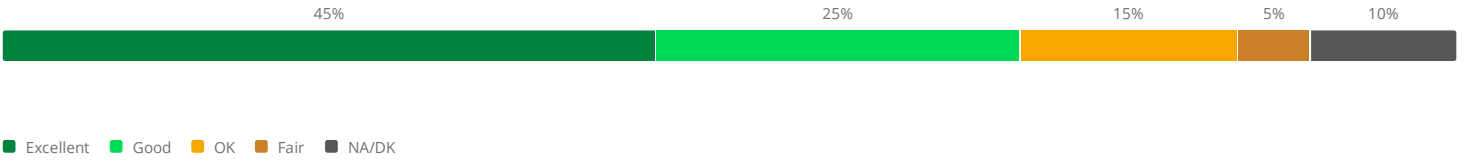
4.2 Examining the board's current composition and identifying gaps, e.g., in expertise, influence, ethnicity, age, gender.



4.3 Identifying and cultivating potential board members.



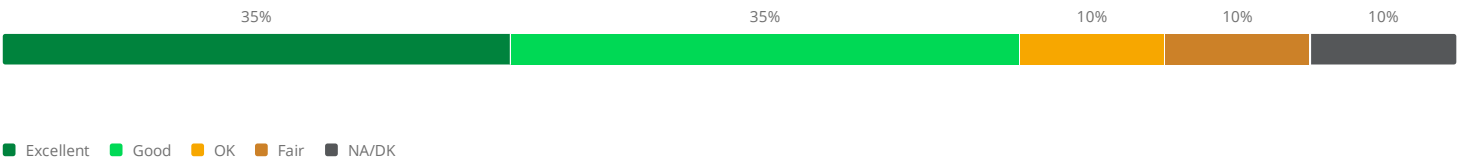
4.4 Ensuring the board reflects the diversity of the community it serves.



4.5 Using an effective process for nominating and electing board members.



4.6 Effectively orienting new board members.



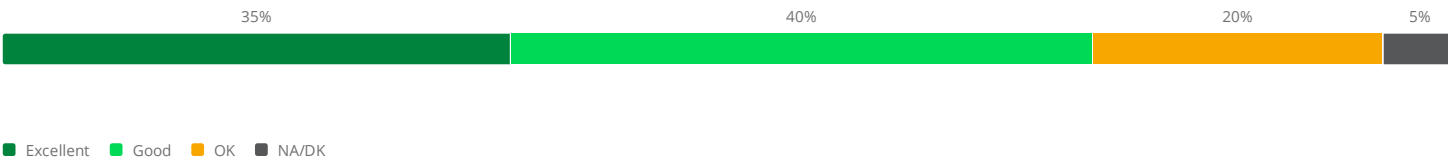
4.7 Establishing and enforcing policies for length of board service, e.g., length of terms and number of terms.



4.8 Planning for board officer succession.



4.9 Utilizing the skills and talents of individual board members.



How can the board improve its performance in this area?

Increasing transparency of board nomination and selection process. Not allowing the CEO/new CEO to dictate who joins and their roles years in advance. We have an opportunity to reset the process and lens for which to move through this process to mitigate bias and personal relationships.

We need a better onboarding process for incoming board members to ensure that they are up to speed and know who to ask. With the board meeting quarterly, it could take a new board member a full year to understand what is going on, the impact, the challenges, etc. Maybe a cohort method, with board orientation would be helpful utilizing existing board members to help champion.

Also, we need more time to connect as a board, learn from one another, and build connections. It would be nice if we better understood board members strengths and backgrounds, outside seeing their resume, to better understand who is in the room and why they may have a certain perspective or take on a given situation.

4.2-4.4 - these functions seem centralized and walled-off from the rest of the board. Understanding that the process has developed from CEO-driven to board-involved in recent years, I'm still not sure how these functions are undertaken. I think we could use much more board-wide involvement and transparency in this area.

4.5 - I can't say that my low rating translates to a belief that the present process has resulted in a bad board. The board composition is excellent. But I was severely disappointed in the process of presenting the last two candidates to the board and calling for a vote immediately after presenting only sparse information about the candidates. It felt like we were being asked to rubber stamp the candidates and I was not pleased with it.

More notice on the folks who are on deck for consideration and approval would be helpful.

Be active in variety of activities associated with the community foundation

Again, unfamiliar with these issues

I received initial orientation but haven't received much beyond that. I sometimes don't feel I am fully contributing as a Board member. I do feel active in Committees so maybe that is the area where I should feel active. I asked for a "mentor" but don't feel connected to the Board beyond those I already knew and had a relationship with.

I think our board takes a thoughtful and methodical approach to board recruitment. The on boarding process is very important.

This seems to be one of the superpowers of the board overall- I would just note that the financial barrier to entry (and/or the filters by which we bring new board members in) really limits the board's ability to represent the community we serve.

There are more conservative elements that are no longer represented on the board. this should concern NMCT and the broader community

I think this is an area of the board that has improved over the past year few years and I think they should continue to build upon the foundation they have put into place.

C | Providing Oversight

(includes Stewardship & Accountability, Financial Oversight, and Chief Executive Supervision)

Oversight involves both authority and accountability. However, in the board's oversight role, the emphasis is on accountability — on making sure the foundation's assets are safeguarded and used responsibly and effectively to implement the mission. The board provides oversight not only of the finances and grants process, but also of the 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. As fiduciaries and stewards of public trust, board members must always act for the good of the foundation, rather than for the benefit of themselves.

Strengthen Financial Oversight through Action

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

Strengthen Grantmaking Oversight through Action

1. Monitor the quality of programs: "Are we doing what we said we would do?" "Are we doing the right thing?" "Are we doing it well enough?"
2. Compare cost and benefits: "Is this program or service making enough of a difference for the people served?" "Is it worth the expenditure of funds and efforts?"
3. 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.
4. Incorporate mission moments during board meetings or create opportunities to see your mission in action.

Support and Supervise the Chief Executive through Action

1. Establish regular communication links between the chair and the chief executive.
2. Provide a clear job description and mutually agreed-upon annual expectations for the chief executive by clarifying what needs to be achieved; when appropriate, provide guidelines.
3. Properly administer annual performance assessment. Look at qualitative and quantitative factors, link goals to measurable indicators, understand that the chief executive's intangible qualities may have a valuable impact on the success of the foundation. Remember that evaluation provides your board the opportunity to strengthen the organization by improving its management.
4. Offer opportunities for professional development and speak candidly when troubling issues arise.

Recommended Resources - Stewardship 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](#)
- Member Resource: [Identifying and Managing Risk](#)

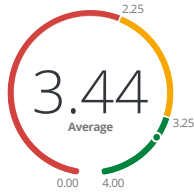
Recommended Resources - Financial Oversight

- Free Community Resource: [Red Flags, Yellow Flags: Are Your Financial Statements Trying to Tell You Something?](#)
- Book: [Financial Responsibilities of Nonprofit Boards](#)
- Guide: [Welcome to Your Financial Statements: A Primer for Nonprofit Board Members](#)

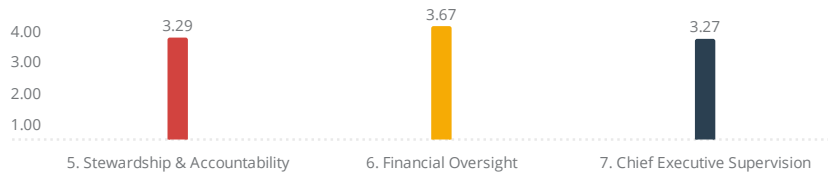
Recommended Resources - Chief Executive Oversight

- Member Resource: [Setting Goals for Your CEO](#)
- Book: [Govern More, Manage Less](#)
- Free Community Resource: [Board Chair and Chief Executive Partnership](#)

Your Providing Oversight Role Score



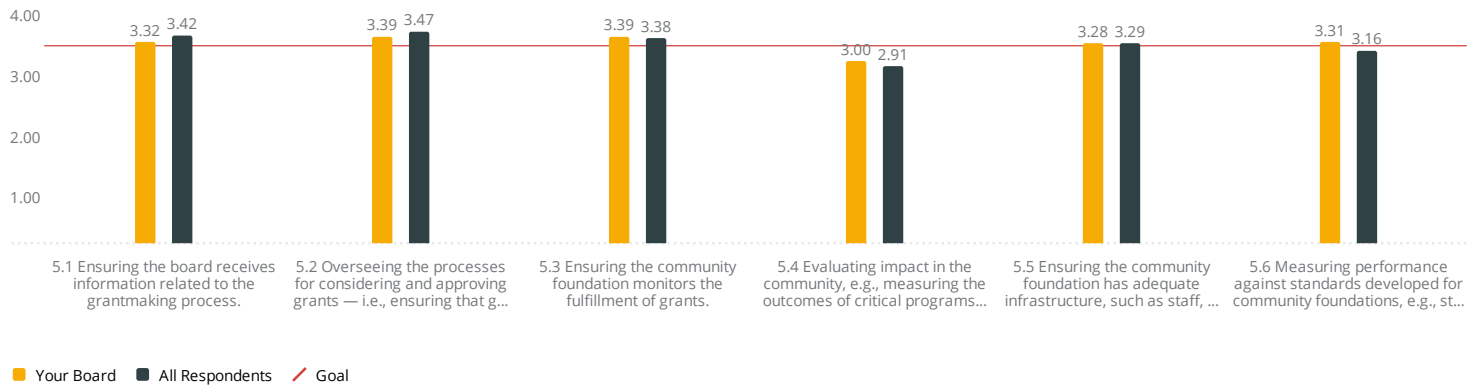
Your role score is based on the following responsibility scores:



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

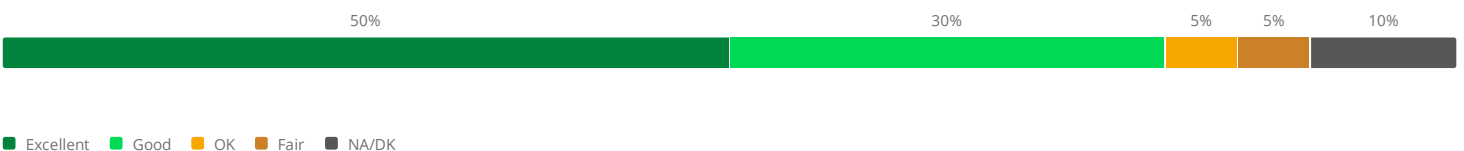
(Please rate the board's performance in...)



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



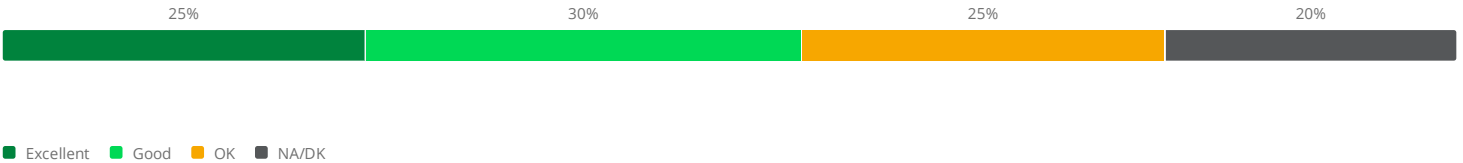
5.2 Overseeing the processes for considering and approving grants — i.e., ensuring that grant awards are consistent with donor intent, that grant process guidelines are disseminated widely, and that the grant process is open and competitive.



5.3 Ensuring the community foundation monitors the fulfillment of grants.



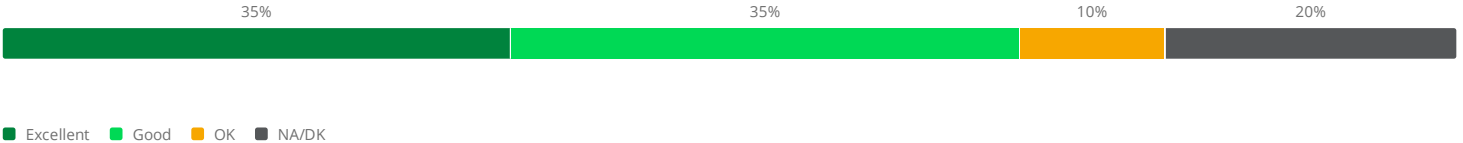
5.4 Evaluating impact in the community, e.g., measuring the outcomes of critical programs and initiatives.



5.5 Ensuring the community foundation has adequate infrastructure, such as staff, volunteers, and technologies to carry out effective program oversight.



5.6 Measuring performance against standards developed for community foundations, e.g., standards for grantmaking, documenting donor-advised funds.



How can the board improve its performance in this area?

Better support the development of goal setting and accountability of the staff. There are some trustees that are operating off of goals that changed, or assumptions that we should be further along than we are - it's a lack of alignment or engagement.

Bucket 5 presents some tension. On one hand, I support the present structure that trusts many of these oversight functions to the staff without micromanagement from the board. On the other hand, I can see how we would miss a critical failure if it wasn't proactively reported to the board. We are not great at drawing information outside of annual investment reviews, some reports about the audit, and updates from committees. But the manner in which grants are given through committees, DAFs, and unrestricted funds is largely left to those bodies and to the staff. Should we do more here? It would draw more time and resources from staff to report these kinds of metrics more frequently. And it may be too much for some board members to want to do.

In my 8 months on the Board, most of our work has been centered around the CEO search and other matters with Donor relations. Most of the meetings have centered around this.

I haven't been on a grantmaking panel yet beyond the giving circle involvement I had. I think once I have this, I'll have a better understanding of process and impact.

I would like to see more commute our board members and to the community about our grant making process and those who receive our grants. Don't feel like I'm fully informed.

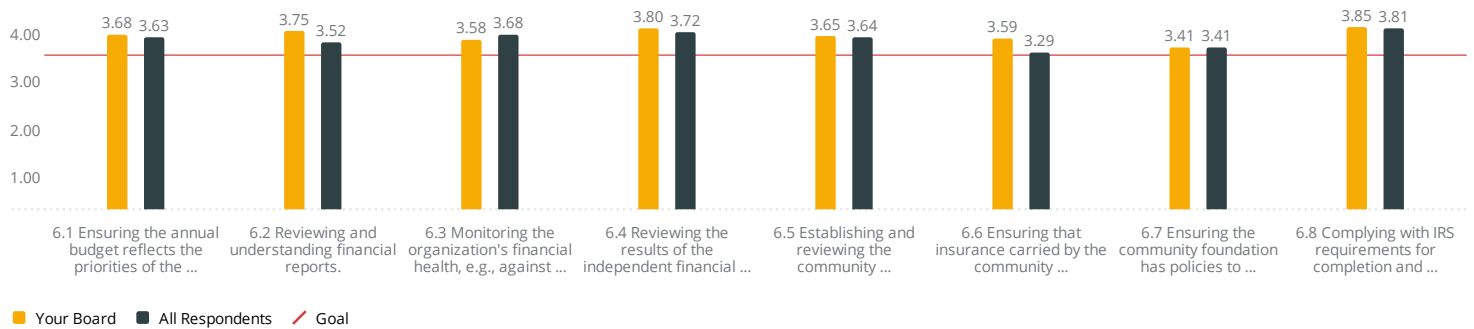
Evaluating impact is always a challenge for grantmakers. Generally speaking, evaluation of impact is stops short at outputs rather than long-term social impact. This is an area where we can continue to work alongside communities to understand and tell the story about community collaboration and change.

It is my impression that the board does not receive enough information on our impact in the community. I think we need to identify a method to measure our impact in the community.

Financial Oversight | Section Detail

As a tax-exempt nonprofit entity, a community foundation operates in the public trust. To preserve that trust, it is critical that a community foundation be a prudent steward of charitable funds, carefully managing and investing funds, overseeing donor-advised funds, and maintaining accurate financial records. The board is responsible for preserving the community foundation's resources, protecting its assets, and maintaining its legal and ethical integrity. The board approves the annual budget and then monitors performance against the budget throughout the year. The board also oversees the annual audit to verify for itself and the public that the community foundation is accurately reporting the sources and uses of its funds. To safeguard the community foundation's future, the board establishes and adheres to appropriate investment and risk-management policies.

Average Score



Question Breakdowns

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

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

6.1 Ensuring the annual budget reflects the priorities of the community foundation.



6.2 Reviewing and understanding financial reports.



6.3 Monitoring the organization's financial health, e.g., against budget, year-to-year comparisons, ratios.



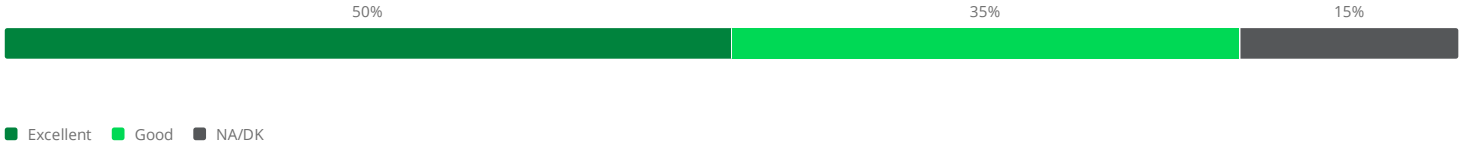
6.4 Reviewing the results of the independent financial audit and management letter.



6.5 Establishing and reviewing the community foundation's investment policies.



6.6 Ensuring that insurance carried by the community foundation is reviewed periodically, e.g., general liability, directors' and officers', worker's compensation.



6.7 Ensuring the community foundation has policies to manage risks, e.g., internal controls, personnel policies, emergency preparedness.



6.8 Complying with IRS requirements for completion and disclosure of Form 990.



How can the board improve its performance in this area?

Generally strong and have had a more critical eye here due to prior year audits. Commend the board for dedicating more time and attention here to get ACF on track with processes and staff levels.

Our financial capacity is one of the strong suites of ACF! We also have outstanding board members who have a strong financial background and help the other board members confidence in their review and sharing of the financial status.

I'm on Finance and Investment and am pretty confident that we are doing what is needed re our finances.

As a new board member, I'm not sure on some of these items but I suspect it's happening.

A yearly high level orientation on the financials would be good for those that aren't deeply involved in the items described above.

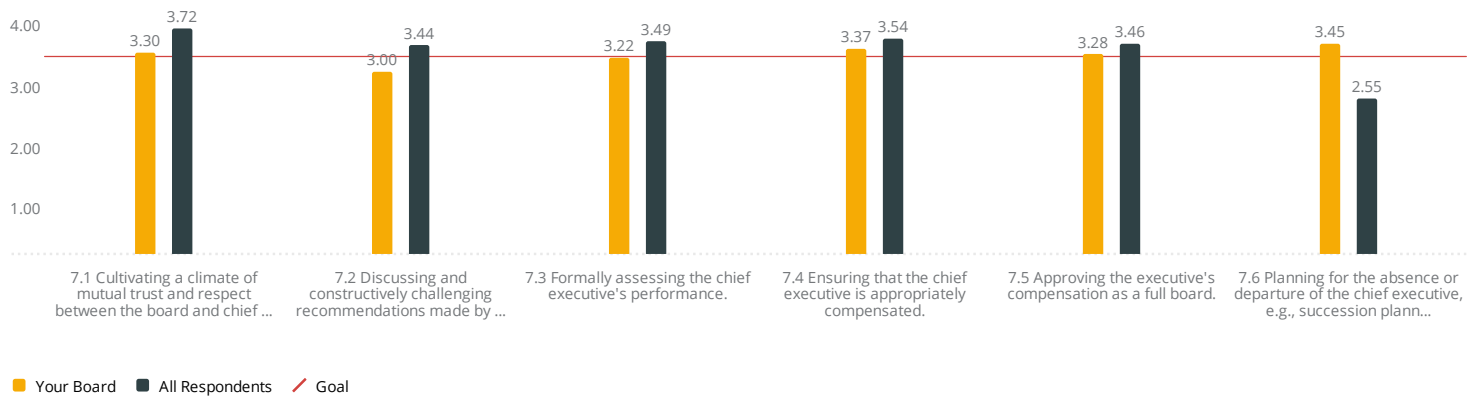
I think this was previously an area that needed work. It's improved.

No suggestions at this time

Chief Executive Supervision | Section Detail

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 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 community foundation. As part of its responsibility for supervising the chief executive, the board ensures that a job description outlines his or her duties, then evaluates the chief executive annually and determines appropriate executive compensation.

Average Score



Question Breakdowns

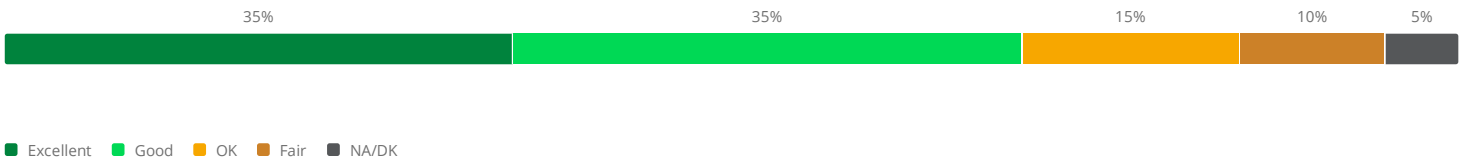
(Please rate the board's performance in...)

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

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



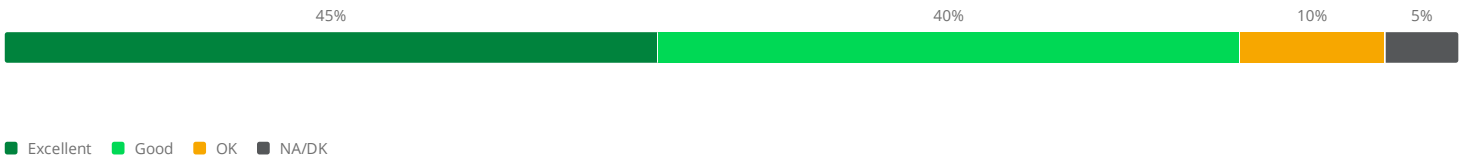
7.2 Discussing and constructively challenging recommendations made by the chief executive.



7.3 Formally assessing the chief executive's performance.



7.4 Ensuring that the chief executive is appropriately compensated.



7.5 Approving the executive's compensation as a full board.



7.6 Planning for the absence or departure of the chief executive, e.g., succession planning.



How can the board improve its performance in this area?

We can create a more objective performance review, now is the time. Some folks know more about performance of the CEO than others, some are personal friends and others not as close so when a review is subjective, all other aspects of relationships and performance are muddled. Great job in completing the succession plan this year - regardless of how painful it was to all row in the same direction.

This is an area that the board, in particular the executive committee, has really shined. They've taken on the transition of the CEO and have reported back to the full board throughout the process to ensure that we've had a clear understanding. By including the third party contractor, this also helped in their understanding and making the best recommendation on a path forward.

While I agree and understand that the board's most important relationship is with the CEO, I would like to see staff invited to attend and observe the board meetings as well. This could lead to greater synergy, mutual understanding, and would flatten communications between the org and its trustees.

A deeper discussion with the full board about executive pay and performance objectives tied to strategy is needed.

Don't set up unreasonable expectations and clearly explain process.....

As a new board member, I haven't been through this full process but from board discussions, it's happening.

With the current process of naming a CEO, I anticipate there might be some trust and partnership challenges to work through between staff and board. There was also no transparency in the cost spent on the consultant or with other candidates. I understand this is a sensitive topic and process, but it made it difficult to understand the full process or vote on decisions we didn't have full insight into.

I think our board collectively learned many important lessons as we embarked on the process to select a new CEO. Moving forward, I am confident we will build a strong and trusting new relationship with our new CEO.

This year of transition provides a great lens and opportunity to reset and clarify our expectations/support in the years ahead.

Randy salary should not have a sunset clause.

We are paying 2 CEOs now.

Most in the community were aware that Randy had tapped Marisa. Randy would even publicly announce this.

The board has done an excellent job working together through the CEO transition.

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.

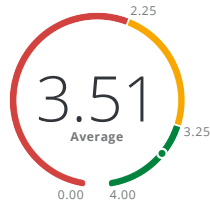
Recommended Resources - Board Structure

- Free Community Resource: [Board Committee Membership: Who Should Serve on Which Committee?](#)
- Member Resource: [Board Development Plan](#)
- 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](#)

Your Board Structure and Operations Role Score



Your role score is based on the following responsibility scores:



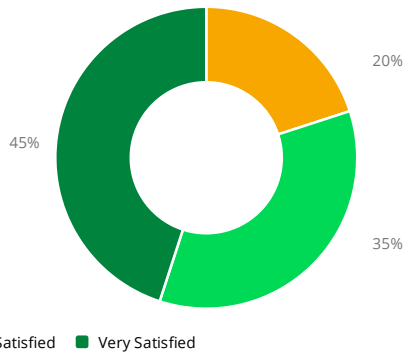
Board Structure | Section Detail

The board is responsible for making sure its own practices are appropriate and up-to-date. This requires that the board have a clear understanding of its roles with staff and an awareness of how these respective responsibilities may change as the community foundation evolves. The board also ensures that it is operating in accordance with the bylaws and other major organizational policies, which are reviewed periodically and revised as necessary. Finally, the board structures itself efficiently using committees and taskforces that have written charters and capable leadership.

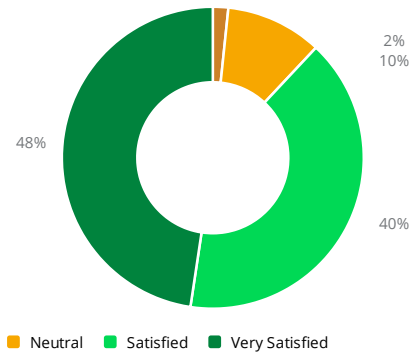
Size Matters

The primary guide for determining board size is the board's function, which may change over time depending on where the organization is in its life cycle, ranging from start-up to adolescent to mature. Variables such as these make it impossible for BoardSource 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.

Satisfaction with Board Size - Your Board



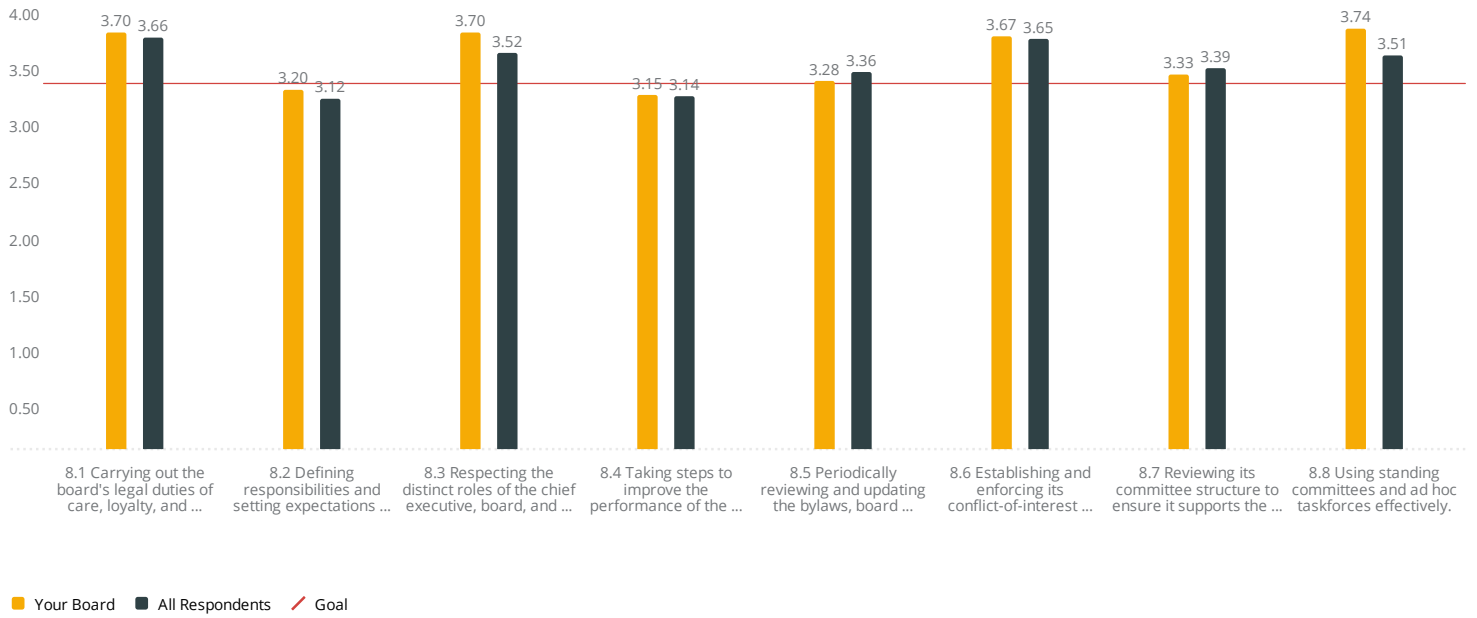
Satisfaction with Board Size - All Boards



Committees

Standing committee structure should be lean and strategic and complemented by the use of task forces. Only ongoing board activities warrant a standing committee. Otherwise, time-limited task forces are efficient and utilize board members' time, interest, and expertise in a meaningful manner.

Average Score



Question Breakdowns

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



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



■ Excellent ■ Good

8.2 Defining responsibilities and setting expectations for board member performance.



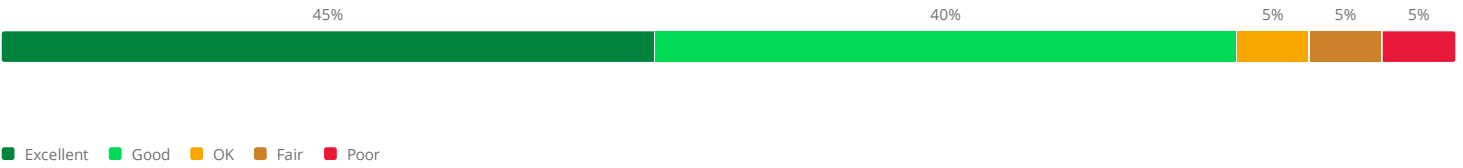
■ Excellent ■ Good ■ OK

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



■ Excellent ■ Good

8.4 Taking steps to improve the performance of the board, e.g., board self-evaluation, board education, development of board action plan.



8.5 Periodically reviewing and updating the bylaws, board policies, and board procedures.



8.6 Establishing and enforcing its conflict-of-interest policy.



8.7 Reviewing its committee structure to ensure it supports the work of the board.



8.8 Using standing committees and ad hoc taskforces effectively.



How can the board improve its performance in this area?

Understanding board roles and responsibilities more deeply could be helpful. I also think it could be helpful to review committee involvement across the Board so everyone knows where we are all engaged.

I think it's a good idea to review our bylaws, policies and procedures. Perhaps this is being done, but I haven't seen the results of this assessment.

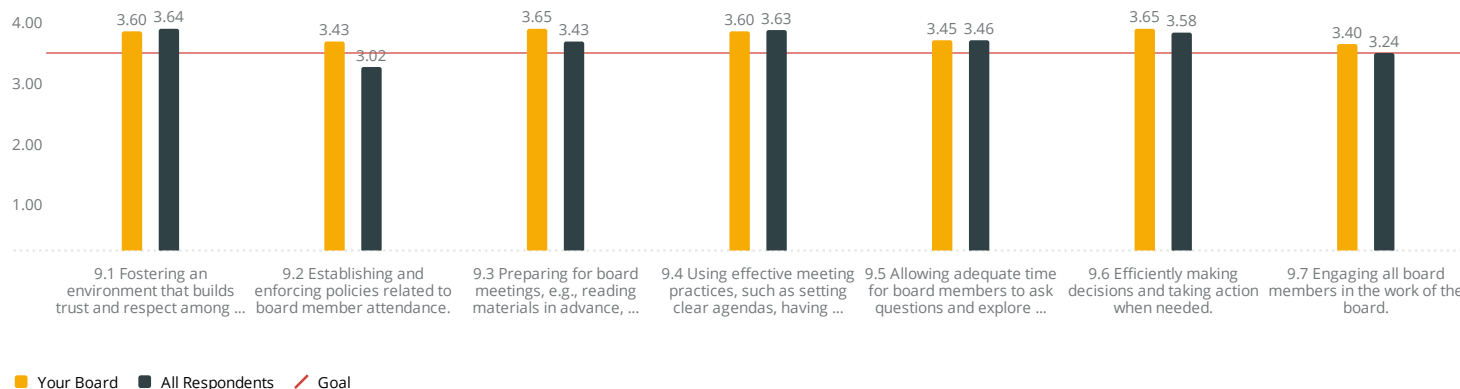
Continued work on defining and focusing on what is most needed from the board

If it doesn't already exist, I would recommend that the board have a cadence (every 2 years) for when they review certain critical compliance policy and procedures to assure that they still meet the needs of the organization and any state or federal requirements.

Meetings | Section Detail

Boards carry out much of their work in meetings. Meetings that are carefully structured and efficiently conducted will help board members feel that their time is well spent and that the board adds value to the organization. Effective boards have meeting agendas that focus on important issues, allow for discussion, and lead to action. To ensure efficiency, board members receive and review agendas and background materials prior to the meetings. To tap into the collective wisdom of the board, boards pay careful attention to boardroom culture, group dynamics, and decision-making processes.

Average Score



Question Breakdowns

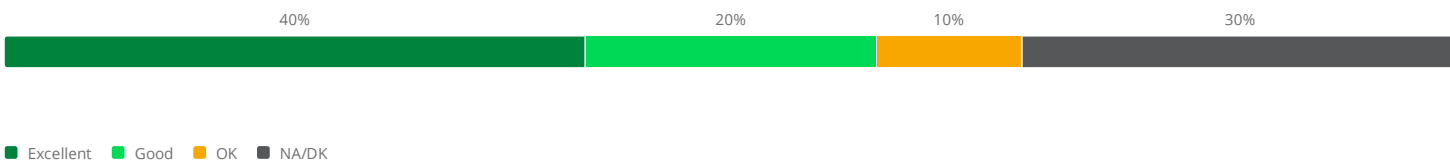
(Please rate the board's performance in...)



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.



9.6 Efficiently making decisions and taking action when needed.



9.7 Engaging all board members in the work of the board.



How can the board improve its performance in this area?

The board is consistently well managed. The board chairs have historically been very good at their tasks.

Emily has done a great job this year and invested a great deal of time for what was likely way more work than she anticipated as chair. Same to EC - lots of extra meetings and time, thank you!

I think because we have a mixture of tenured and new board members, involvement of all board members needs time to cultivate and grow. I think we could get better at gaining everyone's insight and feedback throughout the board meeting and not just the comments and feedback of the few who are vocal. Maybe others who don't speak up too often would feel more at ease using a live survey tool, or other option to submit feedback or input.

Kudos to the staff for all the work they do in preparing the board packets and information in advance. It is always very well organized and I like the board portal with the simple download of the packet or the option to look at it by section.

9.4 - 9.5 - This year has seen rushed meetings to focus on the CEO search. Rightfully so. But it has also led to diminished time to contemplate other important matters. I have felt that some discussions flow through a couple of influential board members with little discussion among the larger group, leading to decision making where issues haven't been fully fleshed out.

More discussion of committee work with full board.

So far meetings I have attended have been well run. Some conflict regarding new CEO selection process could have been avoided imho with clear unambiguous details about the process which could have reduced the 'search' costs. I joined the board after much of this had occurred so my involvement was minimal-I only saw the result of what seemed to me to be disjointed process.

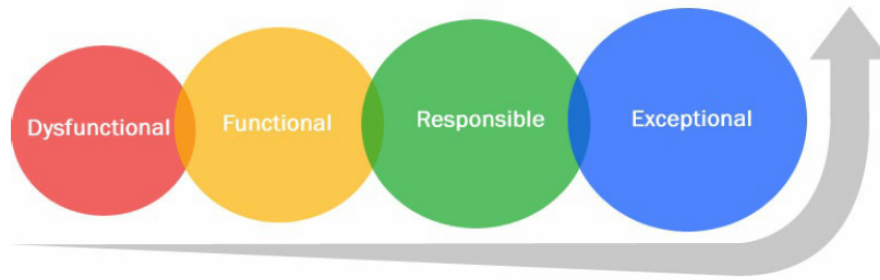
I appreciated having more Executive time this year. I do think meetings continue to get dominated by a small group of the larger board. There have been some meetings where we have smaller group discussions and report out. I feel I am able to have my voice heard in this way.

I think our meetings are run efficiently. We are provided with pre-reading materials with sufficient time to prepare for meetings. We are an engaged board. I really enjoy working with this great group of people.

Better enforcement on attendance, continued alignment on priorities and what the highest/best use of board member time is so that we can continue to hone our focus for a quality over quantity approach to meetings.

No suggestions

Board Performance Continuum



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 advance on 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 and attaining important board priorities. The final step is identifying areas for improvement. To help your board do this, consider the following questions:

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?

Develop a board action plan. Once the board has agreed on its priorities, use a board action plan to help the board stay on track in addressing the issues that surfaced.

Check your progress. Only the board can hold itself accountable for its own performance. In one year, 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.

Additional Services

With the completion of your board self-assessment (BSA), you have joined the ranks of approximately 500 nonprofit boards that used the BoardSource BSA in the past year. Governance does not come naturally to all these leaders. BoardSource offers the following resources for those who seek additional guidance. For more information visit our website: www.boardsource.org.

The Certificate of Nonprofit Board Education

This certificate is for new and potential board members as well as staff and consultants who are new to working with a board. This program is offered through a series of webinars, an on-demand learning platform, or through a live training.

About the Board Self-Assessment and BoardSource

About BoardSource

BoardSource is focused on its core mission of building exceptional nonprofit boards. As a nonprofit organization ourselves, we are acutely aware of the importance of strong board leadership and the impact of exceptional governance. Our goal is to help other nonprofit organizations fulfill their missions and to support the critical work they do in their communities by helping them increase the effectiveness of their boards. With more than 25 years of hands-on experience working with nonprofit boards, BoardSource has become the go-to resource for funders, partners, and nonprofit leaders who want to magnify their impact within their community through exceptional governance practices. BoardSource is a 501(c)(3) organization.

Our History

In the early 1980s, two organizations — Independent Sector and the Association of Governing Boards of Universities and Colleges — conducted a survey of nonprofit organizations and found that although 30 percent of respondents believed they were doing a good job of training and educating their boards, the majority of the respondents reported little, if any, activity in strengthening their board's governance practices. As a result, the two organizations proposed the creation of a new organization to meet the unique and critical needs of nonprofit boards, and in 1988, established the National Center for Nonprofit Boards, now known as BoardSource.

BoardSource Today

BoardSource has an annual budget of approximately \$6 million and maintains a professional staff of more than 25 employees. In addition, the organization has an affiliated pool of consultants and trainers who conduct consulting and training engagements around the world.

BoardSource is the world's foremost publisher of comprehensive materials on nonprofit governance, having sold more than a million copies of more than 100 publications and tools developed over the past 25 years. BoardSource supports a community of more than 80,000 individuals with customized diagnostics, live and virtual trainings, and a comprehensive library of governance resources that includes original publications.

BoardSource began offering the board self-assessment tool shortly after the organization's founding in 1988. The product has evolved from a manually tabulated print survey to a user-friendly online assessment that is widely respected and utilized across the nonprofit sector. The current BSA, which was revised in 2009, is based on the BoardSource publication, *Ten Basic Responsibilities of Nonprofit Boards*, an all-time bestseller with more than 175,000 copies sold. Together, the book and the BSA explore the board's core responsibilities within the context of the governance challenges facing nonprofits today. The BSA for nonprofit boards of public and private charities has been customized specifically for associations, community foundations, private foundations, credit unions, independent schools, and a variety of other subsects of nonprofits within the sector.

Annually, BoardSource hosts the BoardSource Leadership Forum, which convenes hundreds of governance experts, board members, and chief executives of nonprofit organizations from around the world.