DECK

BOARD SELF-ASSESSMENT

Albuquerque Community Foundation
Executive Summary Report

BoardSource®

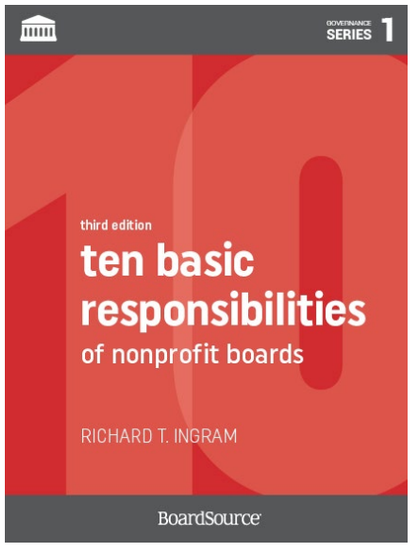
Using the Results

Use the results of your board assessment to:

1. Identify gaps between expectations and actual performance
2. Ensure that all board members have a shared understanding of the board's roles and responsibilities
3. Discuss opportunities to strengthen the board in the context of current performance
4. Model accountability and enhance credibility for the organization among staff, volunteers, donors, and other constituencies

Understanding the Data

The Board Self-Assessment measures your board's performance against recognized roles and responsibilities as defined by BoardSource in *Ten Basic Responsibilities of Nonprofit Boards*.



The scores in this report are based on the following answer scale:
0=Poor; 1=Fair; 2=OK; 3=Good; 4=Excellent

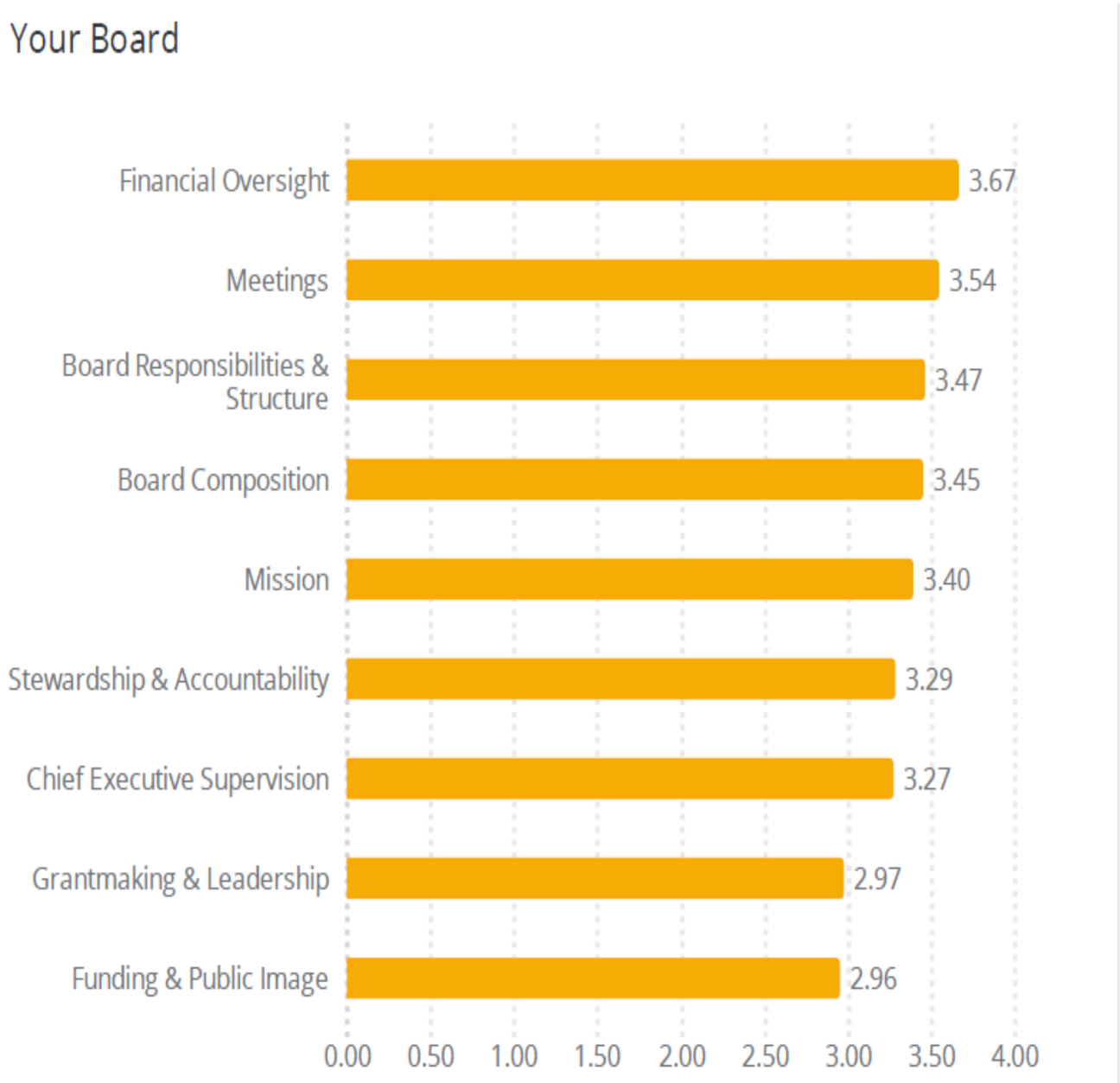
Performance at a Glance

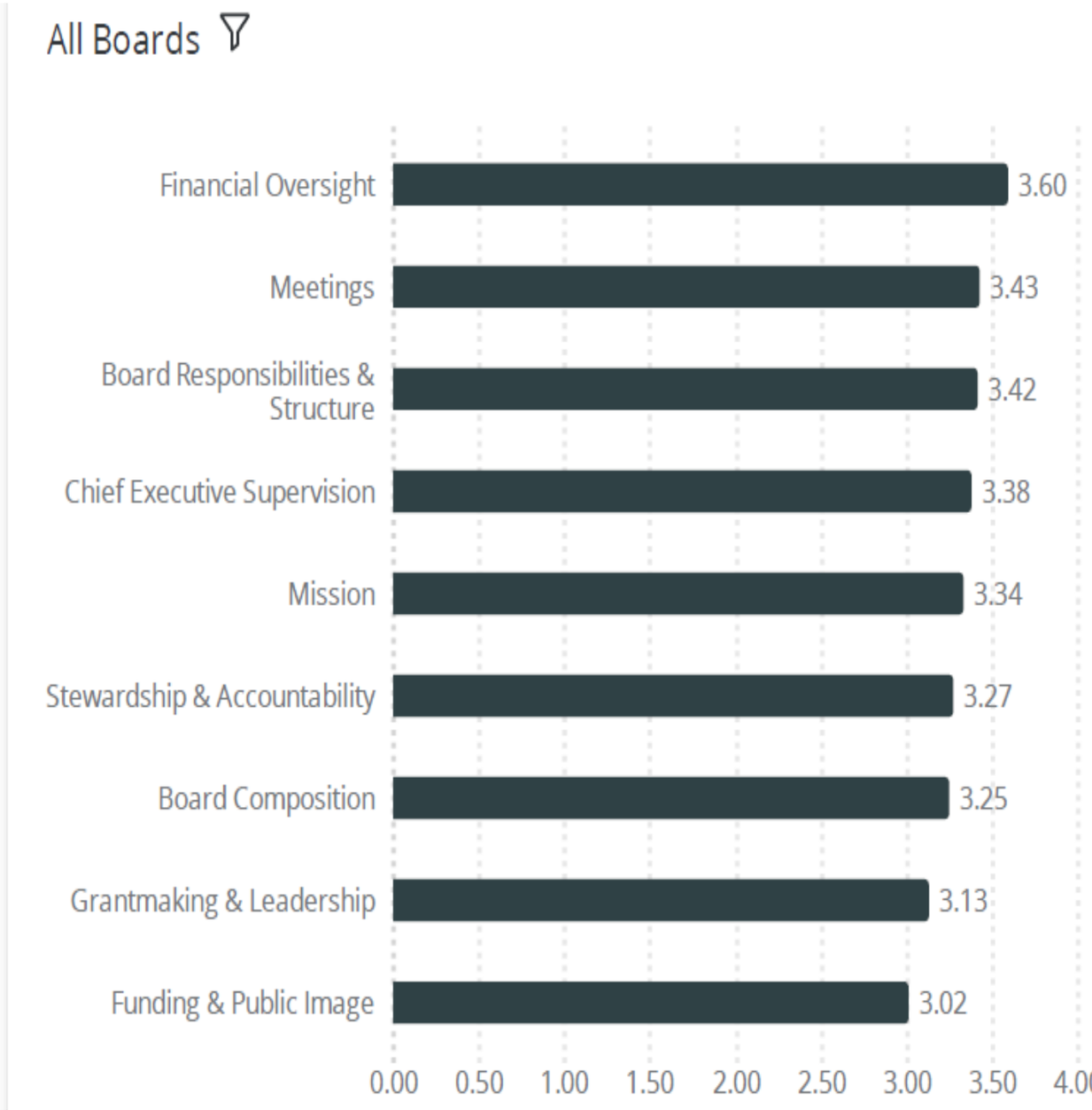
20/22 completed surveys **91% participation**

	Role	Average Role Score	Responsibility	Average Responsibility Score
	A. Set Direction	3.21	Mission	3.40
			Grantmaking & Leadership	2.97
	B. Ensure Resources	3.19	Funding & Public Image	2.96
			Board Composition	3.45
	C. Provide Oversight	3.44	Stewardship & Accountability	3.29
			Financial Oversight	3.67
			Chief Executive Supervision	3.27
	D. Board Structure and Operations	3.51	Board Responsibilities & Structure	3.47
			Meetings	3.54

Please refer to your BSA Report, Overview of Results Section.

Performance Scores: High to Low





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Highest Scoring Questions

Survey Question	Average	Don't Know Count
4.1 Ensuring the current board has the capacity to govern the community foundation.	3.90	0
6.8 Complying with IRS requirements for completion and disclosure of Form 990.	3.85	0
6.4 Reviewing the results of the independent financial audit and management letter. (Select "Not Applicable" if no audit is done.)	3.80	0
6.2 Reviewing and understanding financial reports.	3.75	0
8.8 Using standing committees and ad hoc taskforces effectively.	3.74	1
1.1 Supporting the mission of the community foundation.	3.70	0
8.1 Carrying out the board's legal duties of care, loyalty, and obedience.	3.70	0
8.3 Respecting the distinct roles of the chief executive, board, and staff.	3.70	0
6.1 Ensuring the annual budget reflects the priorities of the community foundation.	3.68	1
8.6 Establishing and enforcing its conflict-of-interest policy.	3.67	2

Lowest Scoring Questions

Survey Question	Average	Don't Know Count
3.10 Holding board members accountable for fulfilling their fundraising responsibilities.	2.36	6
3.11 Ensuring that all individuals involved in fundraising understand the legal issues related to fundraising.	2.38	4
3.8 Introducing the community foundation to potential donors.	2.56	2
3.7 Setting expectations for individual board members to participate in fundraising activities and solicitations.	2.70	0
3.9 Participating in fundraising activities and solicitations.	2.72	2
3.1 Ensuring that the community foundation has a resource development plan.	2.83	2
2.4 Engaging community leaders in identifying and addressing community issues.	2.84	1
2.1 Shaping funding goals or priorities to address community needs.	3.00	1
2.3 Overseeing a process to identify the needs of the community.	3.00	1
5.4 Evaluating impact in the community, e.g., measuring the outcomes of critical programs and initiatives.	3.00	4

“Don’t Know” Responses

If the number of DK answers seems high, it’s time to ask why. If individuals are new to the board, then it makes sense that they can’t answer some questions and there’s no need to worry. If board members should know, take a closer look to determine how this can be improved.

Survey Question	Average	Don’t Know Count
3.10 Holding board members accountable for fulfilling their fundraising responsibilities.	2.36	6
9.2 Establishing and enforcing policies related to board member attendance.	3.43	6
3.11 Ensuring that all individuals involved in fundraising understand the legal issues related to fundraising.	2.38	4
5.4 Evaluating impact in the community, e.g., measuring the outcomes of critical programs and initiatives.	3.00	4
5.6 Measuring performance against standards developed for community foundations, e.g., st...	3.31	4
6.7 Ensuring the community foundation has policies to manage risks, e.g., internal controls, personnel policies, emergency preparedness.	3.41	3
6.6 Ensuring that insurance carried by the community foundation is reviewed periodically, e.g., general liability, directors' and officers', worker's compensation.	3.59	3
4.3 Identifying and cultivating potential board members.	3.65	3
3.8 Introducing the community foundation to potential donors.	2.56	2
3.9 Participating in fundraising activities and solicitations.	2.72	2

Benchmarking Your Board's Performance

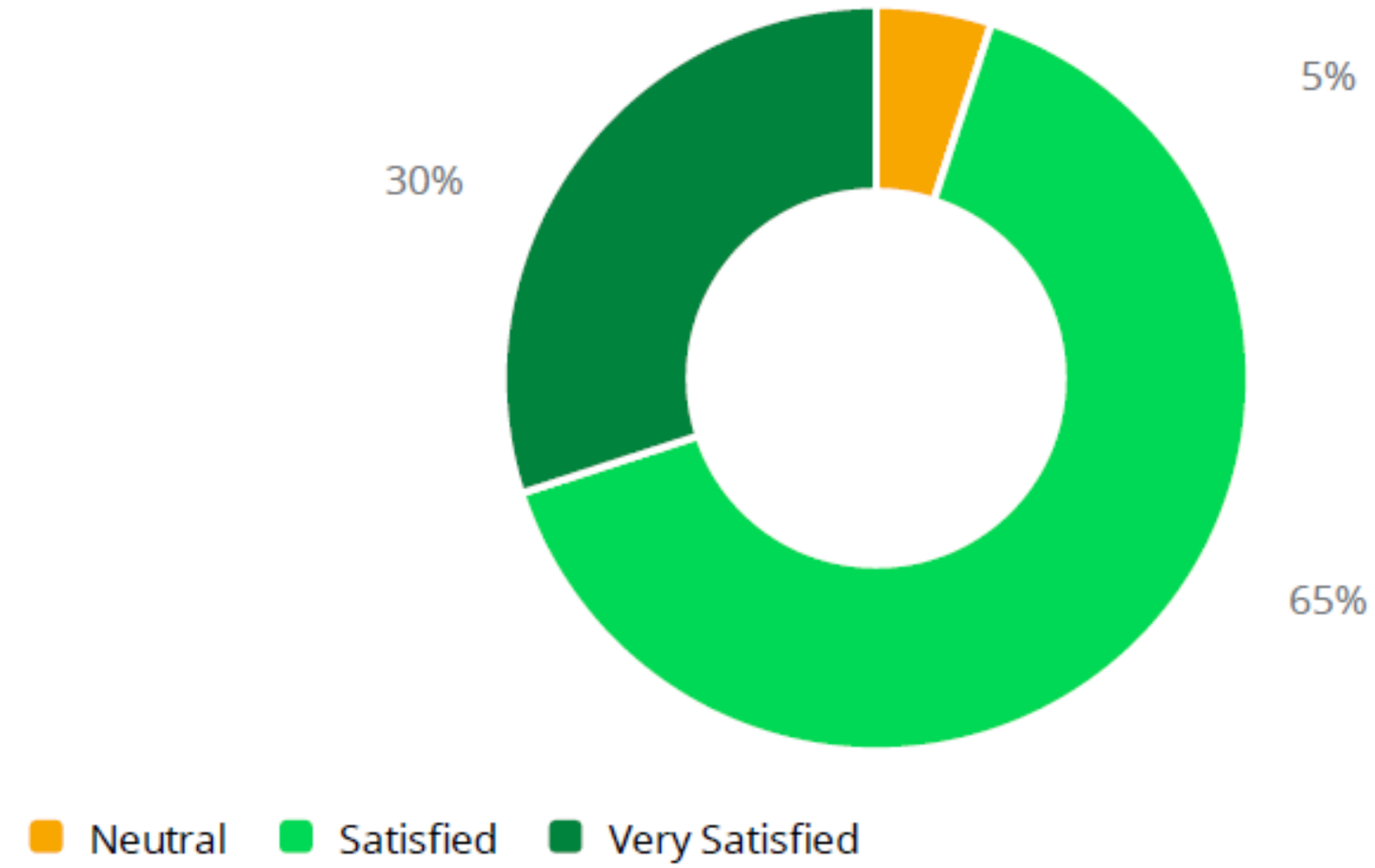
Scores are benchmarked against all organizations that have answered the same questions in the BSA since 2012.

Role & Responsibility	Your Score	Benchmark Score	Comparison
A. Set Direction			
• Mission	3.40	3.34	0.06
• Grantmaking and Leadership	2.97	3.13	-0.16
B. Ensure Resources			
• Funding and Public Image	2.96	3.02	-0.06
• Board Composition	3.45	3.25	0.20
C. Provide Oversight			
• Stewardship and Accountability	3.29	3.27	0.02
• Financial Oversight	3.67	3.60	0.07
• Chief Executive Oversight	3.27	3.38	-0.11
D. Board Structure and Operations			
• Board Responsibilities and Structure	3.47	3.42	0.05
• Meetings	3.54	3.43	0.11

Please refer to your BSA Report, Overview of Results Section.

Satisfaction with Board Effectiveness

How satisfied are you with the overall effectiveness of the board?



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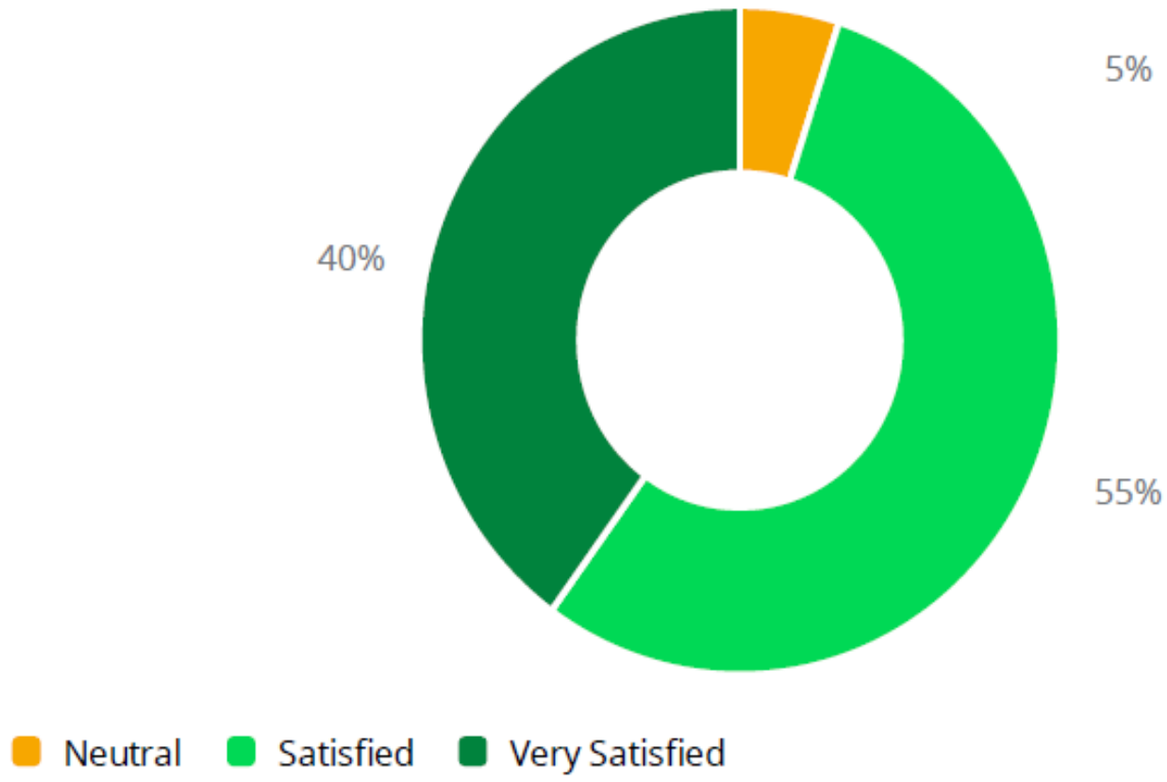
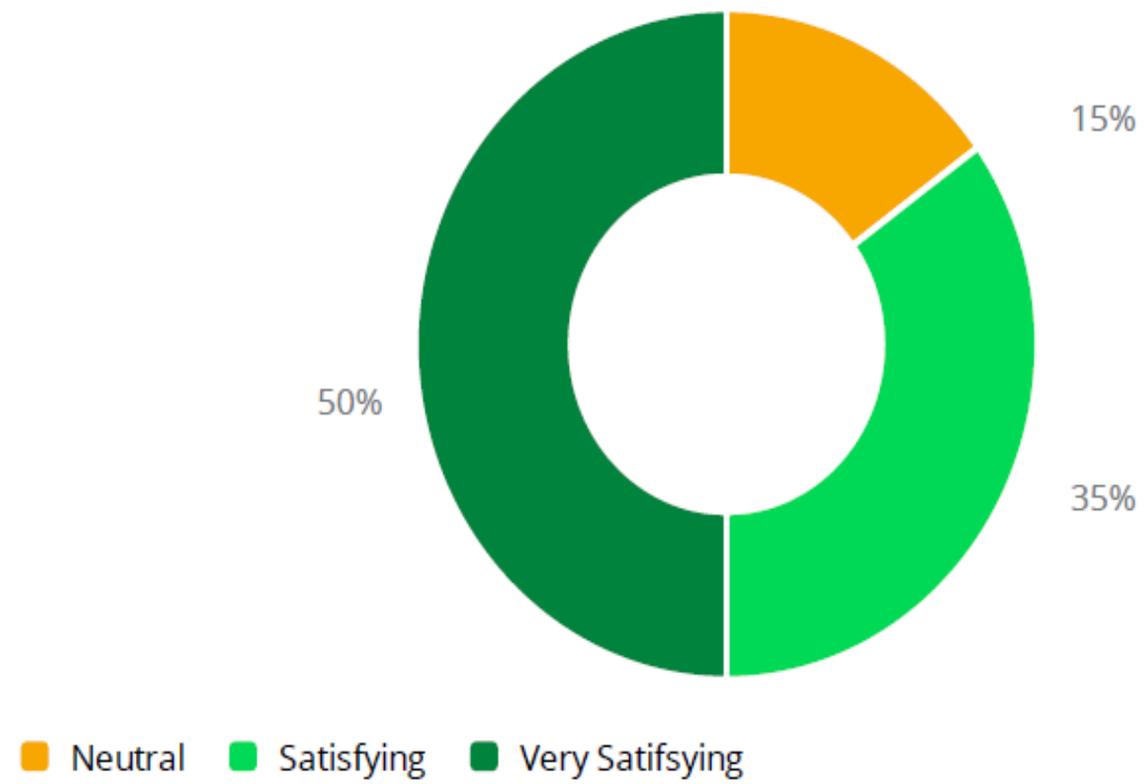
Satisfaction with Commitment & Overall Experience

The level of commitment and involvement demonstrated by most board members.



Do you find serving on this board to be a rewarding and satisfying experience?



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Board Composition: Diversity, Inclusion, and Equity

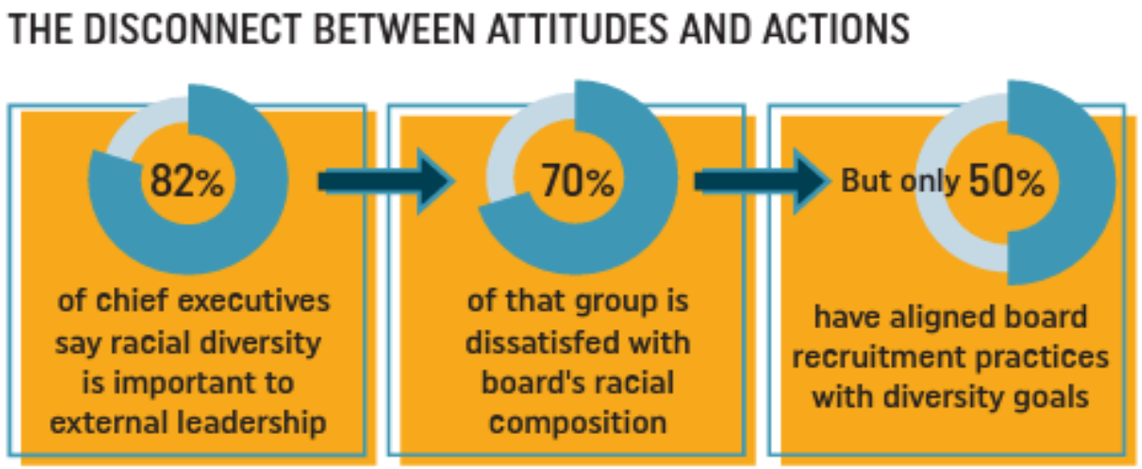
Though not covered in the BSA itself, the next several slides show sector data on the composition of nonprofit boards from BoardSource's 2021 Leading with Intent survey. We believe that to function at the highest level, a board should ensure that its composition incorporates diverse points of view. As evidenced in Purpose-Driven Board Leadership boards represent and govern our organizations on behalf of communities. Who is on the board can drastically change how the board operates and what role it plays. The stakes are high when a board is ill-equipped to understand the impact of its decisions on the diverse communities it seeks to serve.

Our intent with sharing this data is to offer a starting place for your board to begin conversations about what diversity, inclusion, and equity mean for your organization.

Diversity: What's Typical?

Please note: The data on this and the next slide show demographics based on a national convenience sample, which limits how much it can be generalized to the broader public charity community. Having said that, the data provides insight into the relative strengths and challenges of these organizations that may be applicable to the community more broadly. The Leading with Intent report itself was published in 2021, but the survey was conducted in 2019, prior to the COVID-19 pandemic.

Data provided is descriptive rather than instructive and is intended only to serve as a starting point for board discussion.



Disability Status	Chief Executive	Board Chair	Board members
Without disability	95%	97%	95%
With disability	5%	3%	5%

Gender	Chief Executive	Board Chair	Board Members
Female	74%	53%	53%
Male	26%	47%	47%
Non-Binary	<1%	<1%	<1%

	Chief Executive	Board Chair	Board Members
Not Transgender (Cisgender)	99.3%	99.6%	99%
Transgender	1%	<1%	1%

Source: *Leading With Intent 2021*

Board Diversity/Composition Trends

Race & Ethnicity	Chief Executive	Board Chair	Board Members
White/Caucasian/European	87%	83%	78%
Black/African American/African	5%	6%	10%
Hispanic/Latino/Latina/Latinx	3%	5%	5%
Asian/Asian American/Pacific Islander	2%	2%	4%
Multi-Racial/Multi-Ethnic (2 or more races or ethnicities)	3%	2%	1%
Native America/American Indian/Indigenous	<1%	<1%	1%
Other race/ethnicity	1%	1%	2%

Age	Chief Executive	Board Chair	Board Members
Under 35	4%	4%	9%
35 to 44	16%	20%	21%
45 to 54	31%	25%	26%
55 to 64	38%	28%	26%
65 or older	11%	23%	17%

Sexual Orientation	Chief Executive	Board Chair	Board members
Heterosexual or Straight	90%	94%	94%
Gay, Lesbian, Bisexual	9%	6%	6%
Other	1%	0.1%	0.1%

Source: Leading With Intent 2021

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Want More?

The DECK offers a high-level overview of your board's self-assessment results. To drill down further, you might consider the following:

- Use our new consultant directory in order to connect directly with private consultants based on their experience and expertise.
- Explore our education, training and events page for a variety of training and education programs BoardSource offers.
- Visit our BoardSource Bookstore for our library of resources

Additional Questions? Please contact assessments@boardsource.org or 202.349.2583

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