This Board self-assessment was created to help you identify priority areas and topics for which professional development might further strengthen your Board. Please allow around 15 minutes for completion of this survey.

* 1. How long have you served on the Board?

Less than 1 year	
1-3 years	
3-5 years	
5 or more years	

* 2. What is your role on the Board?

☐ Officer   ☐ Non-officer/Member at Large

☐ Other (please specify)

* 3. What is the name of the organization for which you serve as a Board member?

* 4. Please indicate your level of agreement with the following statements.

	Strongly Agree	Agree	Disagree	Strongly Disagree	N/A
The roles and responsibilities of our Board are clearly defined and separate from those of staff.	○	○	○	○	○
Our Board takes the primary responsibility for setting the organization's policies.	○	○	○	○	○
Board members seldom assume roles and responsibilities that belong to staff.	○	○	○	○	○
The Board delegates to the organization's ED/chief executive sufficient authority to lead the staff and carry out the organization's mission.	○	○	○	○	○
Board members do not interact with staff directly to influence staff behavior or program management without first coordinating with and getting the agreement of the ED/chief executive.	○	○	○	○	○

Comments

Board of Directors Self-Assessment

Policy Making Practices

* 5. Please indicate your level of agreement with the following statements.

	Strongly Agree	Agree	Disagree	Strongly Disagree	N/A
The full Board approves all new organizational policies before they are implemented.	○	○	○	○	○
Policies exist for key areas such as finance, human resources, safety, conflicts of interest, legal and ethical compliance, and any other functions unique to our organization's work.	○	○	○	○	○
Policies exist and are freely reviewed periodically that addresses potential conflict of interests held by Board member and/or staff members.	○	○	○	○	○
Our organization's policies are effectively communicated to all Board members.	○	○	○	○	○
The Board reviews policies at least every two years, and updates them as needed. The Board revisits its role as the policymaking body of the organization at least every two years to ensure it is meeting this responsibility.	○	○	○	○	○

Comments

Board of Directors Self-Assessment

* 6. Please indicate your level of agreement with the following statements.

	Strongly Agree	Agree	Disagree	Strongly Disagree	N/A
Our organization's mission and purpose are clearly understood and accepted by our Board.	○	○	○	○	○
The mission and purpose of our organization are reviewed by the Board each time strategic planning takes place to ensure that they are aligned with current program activities.	○	○	○	○	○
Members of the Board reach consensus on a vision that communicates where the organization will be headed over the next 3-5 years.	○	○	○	○	○
The full Board collaboratively reviews and updates the strategic plan for the organization at least every two years.	○	○	○	○	○
The Board is thoroughly briefed on annual plans developed by staff.	○	○	○	○	○

Comments

PARENT TECHNICAL ASSISTANCE CENTERS

Board of Directors Self-Assessment

Fiscal Management Practices

* 7. Please indicate your level of agreement with the following statements.

	Strongly Agree	Agree	Disagree	Strongly Disagree	N/A
The organization's annual budget is fully discussed and understood by the Board prior to approving it.	○	○	○	○	○
The fiscal health of our organization is regularly reviewed and any necessary Board actions are taken thoughtfully but quickly.	○	○	○	○	○
The organization's annual 990 is fully discussed by the Board prior to approving it.	○	○	○	○	○
The Board has the capacity to recognize warning signs that might indicate a change in the overall financial health of the organization.	○	○	○	○	○
Board leadership takes steps to ensure that fiscal reports are thoroughly understood by all Board members.	○	○	○	○	○
The annual report of our organization's independent auditor is reviewed by the Board and any necessary actions are taken in a timely way.	○	○	○	○	○
Board members are fully aware of their legal responsibilities for the organization's management as directed by OSEP funding of Parent Center related activities.	○	○	○	○	○

	Strongly Agree	Agree	Disagree	Strongly Disagree	N/A
The Board regularly receives a copy of the Parent Center grant Continuation Report and monitors progress on the Parent Center grant requirements at least quarterly.	○	○	○	○	○
The Board regularly reviews the financial investment practices and portfolio performance of the organization.	○	○	○	○	○

Comments

Board of Directors Self-Assessment

Fundraising Practices

* 8. Please indicate your level of agreement with the following statements.

	Strongly Agree	Agree	Disagree	Strongly Disagree	N/A
Board members are updated regularly on our knowledge of new best practices in the field of philanthropy and fundraising.	○	○	○	○	○
Our organization's fundraising needs and strategies are understood by the Board.	○	○	○	○	○
The Board has a clear policy on Board members' responsibility to participate in fundraising efforts.	○	○	○	○	○
Board members play an active role in the organization's fundraising efforts.	○	○	○	○	○
Besides giving their time, 100% of Board members contribute financially to the organization at a level that is personally meaningful.	○	○	○	○	○
The Board periodically engages in long range fiscal planning to ensure an adequate flow of financial resources to the organization over time.	○	○	○	○	○
Fundraising needs are reviewed and included by the Board as part of the organization's strategic planning.	○	○	○	○	○

Comments

Board Structure and Practices

* 9. Please indicate your level of agreement with the following statements.

	Strongly Agree	Agree	Disagree	Strongly Disagree	N/A
Our Board's structure allows us to get our work done in a timely and effective way.	○	○	○	○	○
The Board's ad hoc and standing committees streamline our work and increase our Board's effectiveness.	○	○	○	○	○
Our Board's size is about right to do what is required for the organization to be successful.	○	○	○	○	○
Our members' terms on the Board are about the right length.	○	○	○	○	○
We consciously select and prepare Board officers for their leadership responsibilities.	○	○	○	○	○
Board members have a working knowledge of the organization's bylaws.	○	○	○	○	○

Comments

Board of Directors Self-Assessment

Board Committees

* 10. Please indicate your level of agreement with the following statements.

	Strongly Agree	Agree	Disagree	Strongly Disagree	N/A
Ad hoc and standing committee assignments generally reflect the interests and expertise of individual Board members.	○	○	○	○	○
Standing and ad hoc committees complete their tasks in an effective and timely way.	○	○	○	○	○
Most Board members actively participate in standing committee activities.	○	○	○	○	○
Standing and ad hoc committees report on their progress to the full Board in a timely way, but at least quarterly.	○	○	○	○	○
Each standing committee establishes its goals and plans at the beginning of the fiscal year and then modifies them as needed.	○	○	○	○	○

Comments

Board Meetings

* 11. Please indicate your level of agreement with the following statements.

	Strongly Agree	Agree	Disagree	Strongly Disagree	N/A
Our Board meeting schedule has the right number and length of meetings.	○	○	○	○	○
The agendas of our Board meetings and supporting written materials are provided in advance of meetings.	○	○	○	○	○
Board leaders and standing committee members understand their roles and contribute items to meeting agendas.	○	○	○	○	○
Board meetings are generally well run and make good use of members' time.	○	○	○	○	○

Comments

* 12. Please indicate your level of agreement with the following statements.

	Strongly Agree	Agree	Disagree	Strongly Disagree	N/A
The areas of expertise, skills, and other factors we need to be an effective Board for this organization are adequately addressed among current Board members.	○	○	○	○	○
Our Board successfully assesses the expertise, skills, and other contributions we need from potential new Board members to maintain or increase our effectiveness annually.	○	○	○	○	○
When seeking members for the Board we use a wide variety of referral sources within the communities we serve.	○	○	○	○	○
Our Board and staff inform new Board members about responsibilities and important organizational information through a structured new member orientation program.	○	○	○	○	○

Comments

Board of Directors Self-Assessment

Board and ED/Chief Executive Relationship

* 13. Please indicate your level of agreement with the following statements.

	Strongly Agree	Agree	Disagree	Strongly Disagree	N/A
Our Board uses a structured and participative process recruit and hire our organization's ED/chief executive.	○	○	○	○	○
The Board has approved a written job description that clearly spells out the ED/chief executive's responsibility and authority.	○	○	○	○	○
The Board has an approved plan for emergencies that include unexpected changes in organization leadership, including the ED/chief executive.	○	○	○	○	○
The organization has a plan for emergencies for unexpected events, that could include natural disasters, as appropriate.	○	○	○	○	○
The ED/chief executive's performance is formally assessed by the at least annually based on objectives established at the beginning of the fiscal year.	○	○	○	○	○
Board members provide the necessary support that allows the ED/chief executive to carry out the role successfully.	○	○	○	○	○

	Strongly Agree	Agree	Disagree	Strongly Disagree	N/A
The Board ensures that the ED/chief executive has an ongoing professional development plan to enhance the executive's leadership effeffectiveness and ensures the availability of resources to implement the plan.	○	○	○	○	○

Comments

Board of Directors Self-Assessment

Monitoring and Evaluation Practices

* 14. Please indicate your level of agreement with the following statements.

	Strongly Agree	Agree	Disagree	Strongly Disagree	N/A
Board members are adequately knowledgeable about the organization's programs and services.	○	○	○	○	○
The Board periodically reviews with the ED/chief executive the possibilities of adding new programs and services, and modifying or discontinuing current programs and services.	○	○	○	○	○
The Board keeps itself informed of our organization's performance against predetermined plans and goals that are tied to strategic direction.	○	○	○	○	○
The Board annually assesses our Board members' satisfaction with their participation on the Board, using this information for planning.	○	○	○	○	○

Comments

Board of Directors Self-Assessment

External Relations Practices

* 15. Please indicate your level of agreement with the following statements.

	Strongly Agree	Agree	Disagree	Strongly Disagree	N/A
Our Board regularly assesses the effectiveness of our relations with our key external constituent groups.	○	○	○	○	○
Most of our individual Board members are active, either professionally or personally, within the communities served by our organization, and use these opportunities to promote our organization.	○	○	○	○	○
A majority of Board members attends critical organizational events designed to promote the organization (annual meeting, annual programmatic kickoff event, openings of major new programs, etc.).	○	○	○	○	○

Comments

[ ]

* 16. The strengths of the Board are:

[ ]

* 17. The challenges/weaknesses of the Board are:

[ ]

* 18. Do you have any other suggestions for needed training for the Board to be more effective?

[ ]