

SAMPLE Board Assessment Survey Scoring Sheet: RESULTS

This spreadsheet will help you to analyse scores for the Board Assessment Survey. Simply enter your scores into the shaded column(s). Any scores *higher* than the cut-off score indicates an agreement.

Enter the scores here

Survey Items	Pre-training Score	Post-training Score	Total Scores for each Took Kit	Pre-training Score by Module	Post training Score	Whole Tool Kit Totals	Priority by Whole TK
The roles and responsibilities of our board are clearly defined and separate from those of staff.	5		TK1-Structure Recruitment	17			
Our board takes the primary responsibility for setting the organization's policies.	5		TK1-Structure Orientation	38		89	5
Board members seldom assume roles and responsibilities that belong to staff.	4		TK1-Structure Board Book	34			
The board delegates to the organization's chief executive sufficient authority to lead the staff and carry out the organization's mission.	5		TK2-Financials Statement	7			
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 chief executive officer.	5		TK2-Financials 990	3		26	1
The full board approves all new organizational policies before they are implemented.	5		TK2-Financials Fundraising	16			
Policies exist for key areas such as finance, human resources, safety, conflicts of interest,	2		TK3-Legal Duties	58			
Policies exist and are freely reviewed periodically that address potential conflict of interests held by board member and/or staff members.	3		TK3-Legal Conflicts	5		87	4
Our organization's policies are effectively communicated to all board members.	3		TK3-Legal Policies	24			
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.	2		TK4-Board/Staff Roles	89			
Our organization's mission and purpose are clearly understood and accepted by our board.	5		TK4-Board/Staff Executive Director Evaluation	16		109	6
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.	4		TK4-Board/Staff Parent Center Responsibilities	4			
Members of the board reach consensus on a vision that communicates where the organization will be headed over the next 3-5 years.	4		TK5-Succession Planning for Emergencies	7			
The full board collaboratively reviews and updates the strategic plan for the organization at least every two years.	4		TK5-Succession Planning for Agency Leadership	9		27	2
Staff develop and carry out annual action plans based on the board approved strategic plan.			TK5-Succession Planning for Board Leadership	11			
The board is thoroughly briefed on annual plans developed by the staff.	5		TK6-Strategic Planning Overview	11			

The organization's annual budget is fully discussed and understood by the board prior to approving it.	5	
The fiscal health of our organization is regularly reviewed and any necessary board actions are taken thoughtfully but quickly.	5	
The organization's annual 990 is fully discussed and understood by the board prior to approving it.	3	
The board has the capacity to recognize warning signs that might indicate a change in the overall financial health of the organization.	5	
Board leadership takes steps to ensure that fiscal reports are thoroughly understood by all board members.	5	
The annual report of our organization's independent auditor is reviewed by the board and any necessary actions are taken in a timely way.	5	
Board members are fully aware of their legal responsibilities for the organization's management as directed by OSEP funding of Parent Center related activities.	2	
The board regularly receives a copy of the Continuation Report and monitor progress on Parent Center grant requirements at least quarterly.	2	
The board regularly reviews the financial investment practices and portfolio performance of the organization.	2	
Board members are updated regularly on our knowledge of new best practices in the field of philanthropy and fundraising.	2	
Our organization's fundraising needs and strategies are understood by the board.	2	
The board has a clear policy on board members' responsibility to participate in fundraising efforts.	2	
Board members play an active role in the organization's fundraising efforts.	2	
In addition to giving their time, all Board members contribute financially to the organization at a level that is personally meaningful.	3	
The board periodically engages in long range fiscal planning to ensure an adequate flow of financial resources to the organization over time.	3	
Fundraising needs are reviewed and included by the board as a part of the organization's strategic planning.	2	
Our board's structure allows us to get our work done in a timely and effective way.	3	
The board's ad hoc and standing committees streamline our work and increase board effectiveness.	3	
Our board's size is about right to do what is required for the agency to be successful.	1	
Our members' terms on the board are about the right length.	5	
We consciously select and prepare board officers for their leadership responsibilities.	3	
Board members have a working knowledge of the organization's bylaws.	3	
Ad hoc and standing committee assignments generally reflect the interests and expertise of individual board members.	5	
Standing and ad hoc committees complete their tasks in an effective and timely way.	3	
Most board members actively participate in standing committee activities.	2	
Standing and ad hoc committees report on their progress to the full board in a timely way, but at least quarterly.	3	

TK6-Strategic Planning Preparation	20		63	3
TK6-Strategic Planning Implementation	32			

Each standing committee establishes its goals and plans at the beginning of the fiscal year and then modifies them as needed.	3	
Our board meeting schedule has the right number and length of meetings.	4	
The agendas of our board meetings and supporting written materials are provided in advance of meetings.	4	
Board leaders and standing committee members understand their roles and contribute items to meeting agendas.	3	
Board meetings are generally well run and make good use of members' time.	3	
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.	2	
Our board successfully assesses the expertise, skills, and other contributions we need from potential new board members to maintain or increase our effectiveness annually.	4	
When seeking members for the board, we use a wide variety of referral sources within the communities we serve.	3	
Our board and staff inform new board members about responsibilities and important organizational information through a structured new member orientation program.	2	
Our board uses a structured and participative process to recruit and hire our organization's chief executive.	5	
The board has approved a written job description that clearly spells out the chief executive's responsibilities and authority.	4	
The board has an approved plan for emergencies that include unexpected changes in agency leadership, including the chief executive.	4	
The agency has a plan for emergencies for unexpected events, that could include natural disasters, as appropriate.	3	
The chief executive's performance is formally assessed at least annually based on objectives established at the beginning of the fiscal year.	4	
Board members provide the necessary support that allows the chief executive to carry out the role successfully.	3	
The board ensures that the chief executive has an ongoing professional development plan to enhance the executive's leadership effectiveness and ensures the availability of resources to implement the plan.		
Board members are adequately knowledgeable about the organization's programs and services.	4	
We periodically review with the chief executives the possibilities of adding new programs and services, and modifying or discontinuing current programs and services.	4	
Our board keeps itself informed of our organization's performance against predetermined plans and goals that are tied to the strategic direction.	3	
We annually assess our board members' satisfaction with their participation on the board, using this information for planning.	2	
Our board regularly assesses the effectiveness of our relations with our key external constituent groups.	2	
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 agency.	5	

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.).