



Board Assessment Worksheet

Rate your board using the following scale:

0 = No, this does not exist on our board. 1 = We're working on it. 2 = Yes, we're in great shape on this term.

Selection and Composition	
1	The board is composed of persons vitally interested in the organization's work.
2	The board is representative of its constituency with regard to race, class, gender and sexual orientation.
3	There is a balance of new and experienced board members to guarantee both continuity and new thinking.
4	Board members have the combination of skills (e.g., fund raising, management, legal, fiscal, etc.) necessary to do their work.
5	There is a limit to the number of consecutive terms a board member can serve (no life term).
6	The organization has a pool of potential board members identified for the future.
7	The organization develops future board members through the use of volunteers on committees.
8	New board members are recruited and selected using a thorough training process.
Orientation and Training	
9	There is a statement of agreement outlining the responsibilities of board members that all board members sign.
10	The board understands its legal liability.
11	The organization provides an orientation for new board members.
12	The organization supplies a manual to all board members that includes descriptions of current programs, a list of board members, budget and funding information, bylaws and personnel policies.
13	The organization makes training opportunities available for board members to increase skills related to their board responsibilities.
Structure and Organization of Board	
14	The board has simple, concise set of by-laws that describes the duties of board members and officers, and procedures that guide the board's business.
15	The board has a mechanism (such as an executive committee) for handling matters that must be addressed between meetings.
16	The board elects a chairperson (or co-chairs) to provide leadership and coordinate the ongoing work of the board and its committees.
17	The board has active committees (e.g., fund raising, personnel, nominating, long-range planning) with specific responsibilities.
18	Committee assignments are reviewed and evaluated periodically.
19	Working relations between the board chairperson and the executive director are strong and



	productive.	
20	Board and staff members are clear about their respective responsibilities.	
21	Relations between the staff and board are characterized by mutual respect and good rapport.	
The Board at Work		
22	There are regularly scheduled board meetings at least four times a year.	
23	Meetings begin and end on time per an agreed-upon schedule.	
24	There is an adequate preparation and distribution of material, including agendas, study documents, etc., in advance of board meetings.	
25	Board meetings are characterized by open discussion, general participation and active thinking together.	
26	Board members deal primarily with policy formulation; program, financial and long-range planning; financial review; and evaluating the organization's work.	
27	Minutes of board and committee meetings are written and circulated to the members.	
28	Committees are active and complete assigned tasks in a timely manner.	
29	The board is aware of matters of community, state and nationwide concern within the organization's field of service.	
30	Individual board members accept and carry out assignments within the area of their talents and expertise.	
31	Board members follow through on their commitments in a timely	
32	Board members make a generous financial contribution (self-defined) to the organization on an annual basis.	
33	All board members are involved in some aspect of fund raising for the organization.	
34	The board conducts an annual review of its own organization and work.	
35	New leadership is emerging consistently from the board and its committees.	
Other Anonymous Comments You'd Like to Share:		
	TOTAL SCORE:	0

Name (optional): _____ # of years as a board member: _____



SAMPLE

BOARD Assessment Report

Strengths

Board members understand the organization’s mission and its programs
Structural pattern (board, officers, committees, executive, and staff) is clear
Board receives regular reports on finances/budgets, program performance, and other important matters
Board meetings facilitate focus and progress on important organizational matters

Needs Improvement

All necessary skills, stakeholders, and diversity are represented
Board effectively represents the organization to the community

	Considerations	Very Good	Good	Ave.	Fair	Poor	Avg	
1	Board has full and common understanding of the roles and responsibilities of a board	1	5	2			3.88	
2	Board members understand the organization’s mission and its programs	5	3				4.63	Strong
3	Structural pattern (board, officers, committees, executive, and staff) is clear	2	4	2			4.00	Strong
4	Board has clear goals and actions resulting from relevant and realistic strategic planning		3	5			3.38	
5	Board attends to policy-related decisions that effectively guide operational activities of staff	1	6		1		3.88	
6	Board receives regular reports on finances/budgets, program performance, and other important matters	6	2				4.75	Strong
7	Board helps set fundraising goals and is actively involved in fundraising	1	3	4			3.63	
8	Board effectively represents the organization to the community		1	6		1	2.88	
9	Board meetings facilitate focus and progress on important organizational matters	1	6	1			4.00	Strong
10	Board regularly monitors and evaluates progress toward strategic goals and program performance	2	3	2	1		3.75	
11	Board regularly evaluates and develops the Executive Director		4	3	1		3.38	
12	Board has approved comprehensive personnel policies that have been reviewed by a qualified professional	2	1	3	2		3.38	
13	Each member of the board feels involved and interested in the board’s work		4	3	1		3.38	
14	All necessary skills, stakeholders, and diversity are represented on the board	1	1	3	3		3.00	



Please list the three-to-five points on which you believe the board should focus its attention in the next year. Be as specific as possible in identifying these points.

(5) Board members

- Build the board with contributing members
- Recruit more quality board members (20 minimum)
- Recruit new board members to increase diversity
- Provide more opportunities for board members to engage and use their particular talents; committees are helpful but think a new approach is needed for strategic initiatives
- Maintain fewer committees and obtain more participation by board members in committees
- Identify, per board member, one strong, viable new board candidate each year, taking into consideration the individual's ability to contribute financially, experientially, and as generously as possible of his/her time.

(4) Marketing

- Inform the public through media and help parents and students move beyond frustration
- Get children's personal stories and testimony at center of everything school does; commercials, videos, brochures, galas, & fundraisers
- Use any and all effective means to increase the name, purpose, and visibility in Orange County and outside the county as well. For example, Dr. Laura Schlesinger has been advertising the Drake Institute for several years on her daily radio call-in show.
- Seek every opportunity to speak publicly in further enlightening the general populace about dyslexia and to share mission and goals

(3) Budget

- Reduce staff and expenses
- Balance the budget without using any funds
- Long-term restructuring of financial responsibilities; which donations/revenues cover which expenses

(3) Executive Director

- Recruit and hire more management depth; Executive Director needs to spend more time with vision and strategy and hire a couple good "executioners" who can carry out her vision
- Plan for Executive Director's succession (2)