



Board Readiness Evaluation

Your Board can be so focused on the work of the organization, that it can lose track of the basic processes it needs to have in place to be healthy and operating legally. This is a great review for the Board to do annually to get a quick pulse on its fiscal, fundraising and governance responsibilities.

1. My organization has 5 or more Board members who are deeply committed and excited about our cause and message, are ambassadors in the community and are knowledgeable about the organization.

YES

NO

MAYBE

2. My organization has a Board of Directors and President/Executive Director who work together as a team within a culture of mutual respect and appreciation. The President/Executive Director knows what his/her scope of responsibility entails and the Board entrusts him/her to manage the organization's programs and staff.

YES

NO

MAYBE

3. My organization has established Board job descriptions, and Board members know what commitment is being asked of them related to meeting attendance, personal donations, fundraising, confidentiality and conflict of interest. We have ongoing Board training and team building.

YES

NO

MAYBE

4. Our Board has staggered term limits and has an established Board recruitment strategy.

YES

NO

MAYBE

5. Our Board has staggered term limits and has an established Board recruitment strategy.

YES

NO

MAYBE

6. Our Board has a calendar of board meetings and events and creates Board packets that include an agenda, minutes of previous meetings, financials, an President/Executive Director report, and other items needed for or discussion and/or vote.

YES NO MAYBE

7. Our Board members have a copy of our Bylaws, are familiar with their contents, and review them annually in a meeting.

YES NO MAYBE

8. Our Board members review the financials, have an understanding of the financial health of the organization, and take responsibility for the organization's long term viability.

YES NO MAYBE

9. We have an annual strategic planning retreat where we review our programs, finances and set goals for the coming season.

YES NO MAYBE

10. Our Board members willingly accept their role in the process of identifying and soliciting individuals, businesses, foundations for donations.

YES NO MAYBE

TOTAL SCORE: _____ Yes = 2 points, Maybe = 1 point, No = 0 points

8 or Less = You need to focus more on the basics to get ready

9-12 = You're off to a great start, develop a plan to get to the next level

13-16 = Good work, just a few more things to work on

17-20 = Wow, you are rockstars!

So now you can create an action plan for the areas you need to strengthen!