

Assessing Your Board

We take our kids to get check ups, and we go to our own annual well-checks. It is important to have 'well-checks' for our Board as well.



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Different ways to assess your board

Different assessment approaches:

1. Self assessment
2. peer to peer assessment
3. Team assessment
4. Outside evaluation

What are your teams doing to to keep assessments a priority?



Healthy Non-Profits

5 elements of a healthy non-profit:

1. Governance and Boards
2. Fundraising and Financial Management
3. Communications and Relationships
4. Planning, Technology and Administration
5. Management and Culture



What types of Boards do our affiliates have?

- **Working Board:** A working board operates as an organization's staff and board of directors. You can often find working boards at smaller or newer organizations.
- **Advisory Board:** Members provide guidance and recommendations to the working board. Advisory boards can be a great way to gain experience in nonprofit leadership and give back to your community. These are appointed positions and can be a great way to keep prior board members engaged with the organization.
- **Cooperative Board:** All members have the same amount of work and votes as they relate to making decisions.
- **Fundraising Board:** Focus is raising funds for the organization. Board ensures there is enough funding to sustain the operations of the nonprofit. Responsible for bringing in money from various sources such as foundations, corporations, and individuals. Some responsibilities include securing funds through grants and private giving activities.
- **Governing Board:** Has the authority to control and lead an organization. Follows best interests, larger goals, and provides direction to individuals in charge of an organization.



Assessing healthy Non-Profit: Governance and Boards

- Is your mission/vision statement understood by all members?
- Does your team know the results for which you strive?
- Do you review your mission statement regularly?
- Does your board use your mission statement to guide making decisions?



Please share your mission statement: Is it time for a change?

Assessing Healthy Boards: Fundraising and Financial Management

- Financial policies and procedures:
 - Do you have a finance committee?
 - Do you have separation of duties?
 - Do you have processes in place to reduce the risk of fraud, theft, and check for errors?
 - Do you have a reporting process?
 - Do you have a formal budget? How often is it reviewed?
 - Do you have annual expenses? If so, do you have money budgeted for 2x the monthly expenses?



Assessing Healthy Boards: Communication and Relationships

- Mission:
 - Do you have a compelling mission with key messages?
 - How is your leadership advancing your mission?
 - Does everyone on your board understand, believe in, and support your Mission?
- External/Internal Communication:
 - Do you have easy access for audiences to reach members of your board?
 - How is the follow up with those that reach out to your organization? Is there accountability?
 - Do you have a conflict resolution plan?
 - How is internal communication handled? Is it effective?



Communication and Relationships, continued

I, N, S, P, I, R, E

- Does your organization inspire people to join your cause?
- Are the leaders of the organization more interested in advancing their own cause than in benefiting the organization?
- Does the organization share its resources and knowledge, and work with partner organizations to achieve more and make better use of resources?



Assessing Healthy Boards: Planning, Technology and Administration

- Does your organization have short-term goals?
- Recent longer-term business or strategic plan in place?
- Does your leadership regularly monitor progress toward its goals?



- Does your organization have an effective system for collecting and managing client, volunteer, and donor information?
- Does your organization comply with the state's annual filing requirements, as well as Federal annual filing requirements?



Assessing Healthy Boards: Management and Culture



- Diversity and inclusion:
 - Does your organization and leadership integrate diversity and inclusion in its policies and practices?
- Has your organization defined the values and behaviors that shape the organization's culture?
- Does your organization have a clear allocation of authority so that there is no confusion about who makes which decisions?
- Does your organization have systems in place to support the recruitment of qualified candidates?
 - Do you have an explicit strategy for staff retention, including a budget for staff development?



Management and Culture, continued

- Do Board members regularly receive feedback?
- Does the organization have personnel with the right levels of skill and experience in higher risk areas such as finance, information technology and direct service roles like social work or health professionals?
- Do these personnel have opportunities for continuing education and professional development
- On-boarding: Does your organization have a standard process and written procedure for orienting new board members?



Management and Culture, continued

- On-boarding: Does your organization have a standard process and written procedure for orienting new employees?
- Has your organization put in place a succession plan for the executive and other key positions to help ensure that the organization would not experience loss of key information, damage to relationships or organizational failure should there be unexpected or planned turnover in key roles?



All in all...

- If our goal is to be sustainable, We have a lot of work to do! :)



Resources

- <https://www.nonprofitready.org/>
- <https://www.501commons.org/>
- ChangeReadinessSurvey
- <https://boardable.com/>



Questions??


