



## SELF-EVALUATION CHECKLIST FOR BOARD OF DIRECTORS

Name \_\_\_\_\_ Date \_\_\_\_\_

Check the items about which you need more information:

### THE ORGANIZATION: DO I UNDERSTAND:

- \_\_\_\_\_ 1. The stated purpose of the organization
- \_\_\_\_\_ 2. The organizational structure
- \_\_\_\_\_ 3. The bylaws of the organization
- \_\_\_\_\_ 4. The policies & procedures of the organization
- \_\_\_\_\_ 5. The goals of the organization
- \_\_\_\_\_ 6. How the organization plans to change

### THE LEGAL SIDE OF BOARD MEMBERSHIP: DO I KNOW:

- \_\_\_\_\_ 1. What the role of the Board is
- \_\_\_\_\_ 2. Whether it is a policy-making Board, a working Board, or an advisory Board
- \_\_\_\_\_ 3. What my legal responsibilities are
- \_\_\_\_\_ 4. Whether I am insured
- \_\_\_\_\_ 5. What my liabilities are as a Board Member

### THE BOARD MEMBER: DO I KNOW:

- \_\_\_\_\_ 1. Each member of the Board
- \_\_\_\_\_ 2. What the position of each person on the Board is
- \_\_\_\_\_ 3. What the skills are of each Board Member



- \_\_\_\_\_ 4. What position each Board Member holds in the community
- \_\_\_\_\_ 5. What part each person plays in the fulfillment of the purposes of the organization
- \_\_\_\_\_ 6. What my commitments of time and money are
- \_\_\_\_\_ 7. For what scheduled assignments I am responsible
- \_\_\_\_\_ 8. What are the occasional tasks for which I am responsible
- \_\_\_\_\_ 9. To whom am I immediately responsible
- \_\_\_\_\_ 10. Who is immediately responsible to me
- \_\_\_\_\_ 11. For what records am I responsible

#### THE BUDGET: DO I:

- \_\_\_\_\_ 1. Have a copy of the current budget for the organization
- \_\_\_\_\_ 2. Understand the organization's budget
- \_\_\_\_\_ 3. Know who develops, approves & administers the budget
- \_\_\_\_\_ 4. Know if the organization keeps within its budget or has a deficient one
- \_\_\_\_\_ 5. Know what the main revenue source is
- \_\_\_\_\_ 6. Know what the procedures and revenue sources for capital expenditures are
- \_\_\_\_\_ 7. Who audits the organization
- \_\_\_\_\_ 8. If there is adequate insurance
- \_\_\_\_\_ 9. Know what non-dues revenue sources are possible
- \_\_\_\_\_ 10. Know how the size of the budget is determined.



FUNDRAISING:

- \_\_\_\_\_ 1. Am I responsible for donating personally to the Board
- \_\_\_\_\_ 2. How much am I expected to contribute
- \_\_\_\_\_ 3. Am I expected to participate in fundraising
- \_\_\_\_\_ 4. In what way am I expected to participate in fundraising

TIME: DO I KNOW HOW MUCH TIME:

- \_\_\_\_\_ 1. I am expected to give to the organization monthly/yearly
- \_\_\_\_\_ 2. I am expected to give to Board meetings
- \_\_\_\_\_ 3. I am expected to give to fundraising
- \_\_\_\_\_ 4. I am expected to give to special events
- \_\_\_\_\_ 5. I am expected to give to committees

THE STAFF: DO I KNOW:

- \_\_\_\_\_ 1. The personnel policies and procedures
- \_\_\_\_\_ 2. The staff organization
- \_\_\_\_\_ 3. The President (executive)
- \_\_\_\_\_ 4. The key staff



THE PRESIDENT (EXECUTIVE): DO I KNOW:

- \_\_\_\_\_ 1. How the President intends to accomplish the goals of the organization this year
- \_\_\_\_\_ 2. If the President keeps within the budget
- \_\_\_\_\_ 3. If the President is good with personnel
- \_\_\_\_\_ 4. If the President is a good organizer
- \_\_\_\_\_ 5. To whom is the President specifically responsible
- \_\_\_\_\_ 6. Whether the President works well with volunteers

THE VOLUNTEER: DO I KNOW:

- \_\_\_\_\_ 1. How the volunteer program is organized
- \_\_\_\_\_ 2. What the role of the volunteer is
- \_\_\_\_\_ 3. How many volunteers there are
- \_\_\_\_\_ 4. The makeup of the volunteers
- \_\_\_\_\_ 5. Who recruits volunteers
- \_\_\_\_\_ 6. What my role is in relation to the volunteer program

THE POWER STRUCTURE: DO I KNOW:

- \_\_\_\_\_ 1. Who makes the decisions in the organization
- \_\_\_\_\_ 2. How the system of communication is structured
- \_\_\_\_\_ 3. How criticism is handled

Source: Material adopted in part from the Public Management Institute