

Sample Board Assessment Instrument

Ensure Adequate Financial Resources

If an organization raises funds through various forms of solicitations and grant requests, the board must be actively involved. While major responsibility may be delegated to the chief executive or other staff, the board should be involved both in developing the fundraising strategy and in its implementation. Board members can, for example, make personal contributions to the organization, ask friends and colleagues to support the organization, and recommend to the staff particular individuals, corporations, and foundations that might be asked for support.

		Not Satisfied		Satisfied		Not Sure	Not Applicable
How satisfied are you that:							
4.1	the board understands the fundraising strategy for the organization?	1	2	3	4	NS	NA
4.2	all board members provide financial support to the organization on an annual basis?	1	2	3	4	NS	NA
4.3	board members actively participate in fundraising activities and solicitations?	1	2	3	4	NS	NA
4.4	the board has a clear policy on the individual board member's responsibility in the area of fundraising	1	2	3	4	NS	NA
4.5	the board approves policies related to financial resource development?	1	2	3	4	NS	NA

How can the board do better in this area?

Adapted from Building Effective Nonprofit Boards, BoardSource 2005