

SELF-EVALUATION CHECKLIST FOR BOARD OF DIRECTORS

| Name | Date |
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| Check the i | tems 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 Roard Member |



| 4. | What position each Board Member holds in the community |
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| 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 |
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| | 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 |
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| 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 |
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| | 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 |
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| | 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 |
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| 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 |
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| | 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 |
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| | 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