

Interests and Capabilities Questionnaire

Use this tool to capture the capabilities and interests of current and potential board members.

Board Member Name

- | 1. How do you anticipate spending time and energy in your role on the Community Foundation board? |
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| 2. What are your other major commitments and interests? |
| 3. Are there any specific issues, causes or aspects of community that you feel particularly passionate about? |
| 4. Are you philanthropic ? Do you make charitable donations to support causes you care about? |
| 5. What skills or capacities do you feel you can offer to help the Community Foundation? |
| 6. Do you have any connections that you think would help strengthen the Community Foundation's work? |
| 7. Are there any barriers that might make it difficult for you to attend board meetings regularly? |
| 8. Which of the Community Foundation's committees interests you most? |

Self-Assessment and Action Plan

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Board Member Name

PART I. SELF-ASSESSMENT

Please rate your agreement with the following statements.				
As a member of the board, I:	STRONGLY DISAGREE		STRONGLY AGREE	
1. Understand, support and promote the mission , goals and work of the Community Foundation.	1	2	3	4
2. Prepare in advance, regularly attend and actively participate in board meetings.	1	2	3	4
3. Believe my thoughts and opinions are heard and considered .	1	2	3	4
4. Find board service to be a rewarding experience .	1	2	3	4

PART II. ASSESSMENT OF THE BOARD AS A WHOLE

Please rate your agreement with the following statements.				
OPERATIONS: In my opinion, the board:	STRONGLY DISAGREE		STRONGLY AGREE	
1. Is effectively organized and leverages individual strengths and skills .	1	2	3	4
2. Recruits and orients new members with skills and perspectives needed to further our mission .	1	2	3	4
CULTURE: In my opinion, board members:	STRONGLY DISAGREE		STRONGLY AGREE	
3. Have productive discussions and effectively handle disagreements.	1	2	3	4
4. Are both physically and mentally present at meetings.	1	2	3	4
5. Strongly encourage reflection and learning .	1	2	3	4
RELATIONSHIPS : In my opinion, board members:	STRONGLY DISAGREE		STRONGLY AGREE	
6. Have strong camaraderie with one another.	1	2	3	4
7. Have a strong relationship with the Community Foundation's chief executive .	1	2	3	4
8. Have a strong relationship with the Community Foundation's staff .	1	2	3	4

PART III. REFLECTION AND COMMENTS

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Use a separate sheet to share comments, including responding to the items below.

If you “disagreed” or “strongly disagreed” with any of the statements in the self-assessment, please explain why. What would improve your effectiveness as a member of the Community Foundation board?

If you “disagreed” or “strongly disagreed” with any of the statements in the assessment of the board as a whole, please explain why. What could the Community Foundation do to better support you or the board as a whole?

PART IV. PERSONAL ACTION PLAN

Use the prompts and spaces below to establish your goals as a Community Foundation board member for the coming year.

Personal action plan:	MY GOAL	SIGN(S) OF SUCCESS	TIMING
1. Strategy: Participating in the strategic planning process, from plan creation to implementation. Offering big-picture ideas and support that helps the Community Foundation realize its mission and operate effectively over the long term.			
2. Giving: Making financial contributions that power the Community Foundation’s work.			
3. Connection: Using my personal and professional network to advance the mission of the Community Foundation.			
4. Ambassadorship: Promoting the value of the Community Foundation in ways and venues that increase its visibility and credibility.			
5. Issue Expertise: Putting my experience in and passion for an important issue (e.g., the arts) to work for the Community Foundation.			
6. Memory: Helping the Community Foundation stay on track with its strategic plan by keeping tabs on board and staff rationale and lessons learned along the way.			
7. Presence: Attending and actively participating in board meetings, committee meetings and Community Foundation sponsored events.			
8. Learning: Actively seeking ways to learn about philanthropy, local needs and opportunities, and other topics important to our organization and community.			
9. Other: Setting and achieving some other goal that advances the Community Foundation and/or improves my experience as a board member.			

Engagement Tracker

Board Member Name _____

Rate engagement in the following dimensions, noting any comments in the space below.				
This board member:	STRONGLY DISAGREE			STRONGLY AGREE
1. Understands, supports and promotes the mission and goals of the Community Foundation.	1	2	3	4
2. Is familiar with the Community Foundation's services .	1	2	3	4
3. Understands his/her roles and responsibilities .	1	2	3	4
4. Has/seek knowledge about needs and opportunities in the community.	1	2	3	4
5. Monitors key developments and trends in philanthropy.	1	2	3	4
6. Prepares in advance, regularly attends and actively participates in board meetings.	1	2	3	4
7. Volunteers for working groups and committees , and serves effectively on them.	1	2	3	4
8. Participates in activities and events sponsored by the Community Foundation, such as fundraisers or convenings.	1	2	3	4
9. Makes significant (based on personal means) financial contributions to the Community Foundation.	1	2	3	4
10. Nominates others who can add value and strengthen composition of the board, committees and volunteer groups.	1	2	3	4
11. Offers specific skills, expertise and relationships in the community to enhance the organization's outreach and services.	1	2	3	4
12. Communicates the value of philanthropy to policymakers, grantmakers, the media and the general public when given the opportunity.	1	2	3	4
13. Expresses his/her thoughts and opinions .	1	2	3	4
14. Believes his/her thoughts and opinions are heard and considered .	1	2	3	4
15. Values providing leadership to the field .	1	2	3	4
16. Finds board service to be a rewarding experience .	1	2	3	4
17. Feels comfortable communicating the Community Foundation's strategic plan .	1	2	3	4
Comments:				

Meeting Assessment Tool

Constructing Better Board Meetings

Rate three key aspects of today's meeting. Use the space at bottom to add comments.

	LESS IMPORTANT			ESSENTIAL
1. The issues we covered today were:	1	2	3	4
	NOT HELPFUL		INDISPENSABLE	
2. The materials provided were:	1	2	3	4
	OPERATIONS		POLICY AND STRATEGY	
3. Today's discussion concerned primarily:	1	2	3	4

Other comments. Use this space to provide any other inputs. Consider questions such as:

- What might we have done **differently** to improve our meeting today?
- What was the most valuable **contribution** we made to the Community Foundation's success today?
- Did we use the **time** allotted for the meeting wisely?
- In light of today's meeting, what are the most important topics we should address at our **next meeting**?