



2015 Board Self-Assessment Survey

***1. The Board has a well-defined policy on Trustee selection.**

Disagree

Somewhat Agree

Agree

***2. The selection process is accomplished in a manner that seeks to ensure diversity of background and experience.**

Disagree

Somewhat Agree

Agree

***3. There is a clear description for new Trustees that sets forth the responsibilities of the individual members and of the Board.**

Disagree

Somewhat Agree

Agree

***4. There is a policy on conflict of interest to which all members of the Board subscribe.**

Disagree

Somewhat Agree

Agree

***5. The Board knows and understands the TREE Fund's values, mission, strategic plan and work plans (i.e. fund development plan, communications plan and budget) and reflects this understanding on key issues throughout the year.**

Disagree

Somewhat Agree

Agree

***6. The Board follows procedures for effective meetings.**

Disagree

Somewhat Agree

Agree

***7. Board meetings are conducted in a manner that ensures open communication, meaningful participation, and timely resolution of issues.**

Disagree

Somewhat Agree

Agree

***8. Board members receive timely and accurate minutes, advance written agendas and meeting notices, and clear and concise background material to prepare in advance of meetings.**

Disagree

Somewhat Agree

Agree

***9. Board members evaluate their individual and overall Board performance on an annual basis.**

Disagree

Somewhat Agree

Agree

***10. The Board reviews and adopts an operating budget, which is regularly monitored throughout the year.**

Disagree

Somewhat Agree

Agree

***11. The Board monitors TREE Fund performance with comparative data from the foundation industry.**

Disagree

Somewhat Agree

Agree

***12. Board members stay abreast of issues and trends affecting the TREE Fund and use this information to assess and guide the TREE Fund's performance not just year to year, but in the long term.**

Disagree

Somewhat Agree

Agree

***13. Board members comprehend and respect the difference between the Board's policy-making role and the President/CEO's management role.**

Disagree

Somewhat Agree

Agree

***14. Board goals, expectations and concerns are honestly communicated with the President/CEO in writing.**

Disagree

Somewhat Agree

Agree

***15. The Board responds to staff requests in a timely manner.**

Disagree

Somewhat Agree

Agree

***16. Policies and procedures are appropriately reviewed on a periodic basis.**

Disagree

Somewhat Agree

Agree

***17. The Board approves and evaluates programs and activities of the organization.**

Disagree

Somewhat Agree

Agree

***18. The Board sets financial objectives and monitors their achievement. The Board's fiduciary responsibility is to protect/ensure the organization's financial status.**

Disagree

Somewhat Agree

Agree

***19. The Board is aware of the TREE Fund's policies guiding the operation of the organization.**

Disagree

Somewhat Agree

Agree

***20. Each Trustee actively serves on at least one standing and/or ad hoc committee.**

Disagree

Somewhat Agree

Agree

Done

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