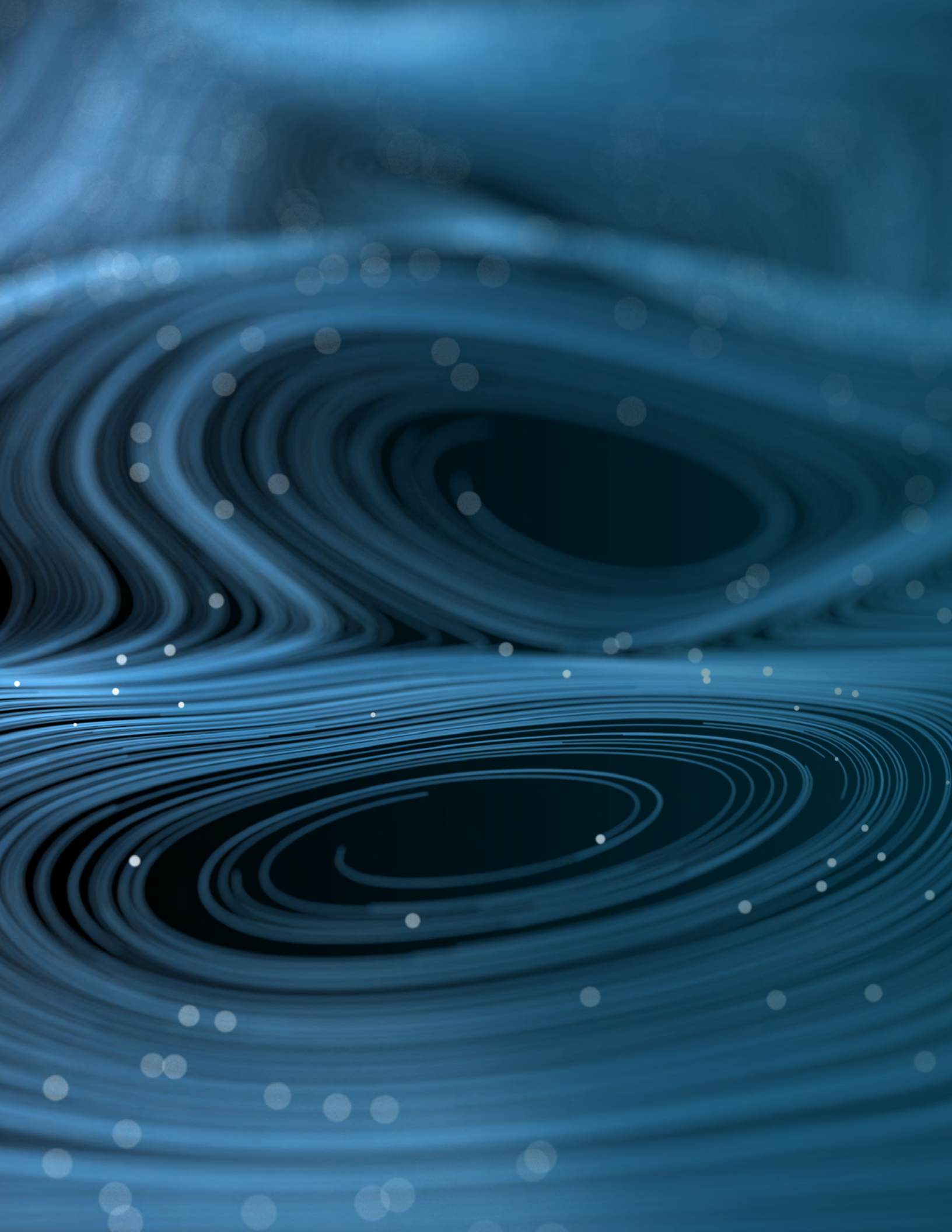




**BoardSource Index of
Nonprofit Board Practices**

JUNE 2021

BoardSource[®]
Empowering Boards. Inspiring Leadership.



CONTENTS

Introduction	4
Key Findings	5
Methodology & Overview of Sample	6
Acknowledgments	8
The Work: What Boards Do & How Well They Do It	10
Board Performance Ratings	12
Self-Reported Trends and Priorities in Board Performance	13
The Board's Three Functions	15
Setting Direction & Strategy	15
Providing Oversight	17
Ensuring Resources	17
Planning for Succession	21
Other Essential Oversight Practices	22
The Boards Role in Fundraising	22
Advocacy Performance	23
The People: Who Boards Are and How They are Structured	26
Demographic Summary of Board & Executive Leadership	28
Self-Assessment of Board Composition	29
Board Recruitment Priorities and Approaches	30
Board Chair Selection	32
Trends in Board Structure	33
The Culture: How Boards Operate as a Group	34
Board Chair as Steward of Board Culture	37
The Impact: What Matters Most When It Comes to Board Leadership?	38
The Board's Impact on Organizational Performance	40
The Impact of Board Composition	40
Impact of Role Understanding	41
Impact of Regular Board Self-Assessment	44
Impact of Strong Understanding of Programs	45
The Board's Impact on the Chief Executive	45
Partnership & Support	45
Job Satisfaction	46
Data Book	48

INTRODUCTION

As the leading organization focused on strengthening and supporting nonprofit board leadership, BoardSource has been tracking and analyzing trends in nonprofit board leadership since we launched our first national study in 1994.

This report highlights findings from the most recent study and is organized into four broad categories. In practice, these categories are deeply intertwined and difficult to disentangle, but they provide a framework for exploring the relationship between who serves on a board, how it is structured, the culture it cultivates, the way that it does its work, and the impact it has on the organization:

1. Work: What Boards Do & How Well They Do It

Boards are charged with many important responsibilities. This section explores how well boards are fulfilling their basic, strategic and adaptive, and external leadership roles.

2. People: Who Boards Are and How They are Structured

Having the right people on a board makes higher performance — in both the board's internal and external functions — more likely.

3. Culture: How Boards Operate as a Group

How the board conducts its work — from group dynamics to its relationship with the chief executive — can help or hinder the board's ability to carry out its work. Likewise, board culture and dynamics are also affected by who serves on the board and the nature of the work that the board undertakes.

4. Impact: What Matters Most When It Comes to Board Leadership

Ultimately, the most important measure of board performance is the impact that the board has on organizational performance. While *Leading with Intent* does not delve into objective measures of organizational effectiveness and the board's impact on them, it explores board chair and executive perceptions of the board's impact on organizational performance, and board practices that seem to be most relevant in terms of the board's impact.

KEY FINDINGS

1. **Boards are disconnected from the communities and people they serve.** Almost half (49%) of all chief executives said that they did not have the right board members to “establish trust with the communities they serve.” Only a third of boards (32%) place a high priority on “knowledge of the community served,” and even fewer (28%) place a high priority on “membership within the community served.” ➤ Read more on page 29.
2. **Boards that prioritize fundraising above all else when it comes to the board’s role do so at the expense of organizational strategy, relevance, and impact.** Executives that reported placing the highest level of importance on fundraising have lower ratings in several key areas of performance as compared to those that do not place such high importance on fundraising. ➤ Read more on page 22.
3. **Boards and executives should reflect on what is prioritized in terms of board expectations and how time is spent.** When asked to rate how much time is spent on each board area, executives reported that not enough time was spent in three areas:
 - Building a Diverse and Inclusive Board With a Commitment To Equity
 - Understanding The Context In Which The Organization Is Working
 - Building Relationships Within The Community That Help Support and Inform The Organization's Work (Separate From Fundraising)

But, when asked about how important these areas are, executives placed them very low on the list in terms of their expectations for the board. If we use desired “time spent” as a proxy for level of priority, it is interesting to reflect on this dissonance and how that should impact the board's priorities and where it spends its time. ➤ Read more on page 14.

4. **The board chair's leadership in ensuring that there are clear expectations of board service seems to matter most when it comes to the board's overall culture.** When executives rated their chairs higher in terms of the board chair's performance in all categories, but especially in ensuring clear expectations, the executive was more likely to rate the board higher than the average across all areas of board culture. While we cannot determine causation or even directionality, it may be helpful for boards that are having culture challenges to consider the ways in which changes in board chair engagement could make a difference. ➤ Read more on page 37.

METHODOLOGY & OVERVIEW OF SAMPLE

Leading with Intent reports on nonprofit board composition, practices, performance, and culture. This year's study is BoardSource's tenth, with previous studies conducted in 1994, 1996, 1999, 2004, 2007, 2010, 2012, 2015 and 2017.

Leading with Intent is unique in that it collects responses and feedback from both chief executives and board chairs, creating opportunities to compare and contrast these perspectives.

BoardSource received a total of 820 individual responses: 689 from chief executives and 131 from board chairs.¹ The responses outlined in this report are only from public charities, which is a difference from previous studies.

The *Leading with Intent* chief executive survey included 91 questions about board composition, structure, practices, performance, and culture.

The board chair survey included 77 questions, many of which mirrored questions that were asked of the chief executives, with an emphasis on those questions that invited subjective ratings of board performance and culture. For participation in the survey, all respondents received a free PDF of a BoardSource publication. Both chief executives and board chairs could also opt-in to an additional set of questions (38 questions for chief executives and 20 for board chairs) providing deeper information and context around the core set of questions. 416 chief executives and 82 board chairs completed the optional set of questions. For completing this optional set of questions, participants were entered into a raffle in which one respondent received complimentary registrations for our next BoardSource Leadership Forum for themselves and their respective chief executive/board chair along with two nights of accommodation. An overview of the raw findings and select comparative data tables are presented in the Data Book at the end of the report (see page xx).

Respondents represent a broad cross-section of public charities, including organizations with different budget sizes, geographic regions across the United States (and a few outside of the U.S.), and mission areas. See page 7 for a snapshot of the organizations in the sample.

For the survey, BoardSource identified respondents in two primary ways:

1. A direct invitation from BoardSource to chief executives and board chairs who have opted-in to BoardSource's network of leaders and to participants in past *Leading with Intent* surveys.
2. An open invitation to participate in the study promoted through partner organizations and other broad outreach channels (social media, e-newsletter, daily news brief, etc.).

SURVEY RESPONDENTS

	#	% of Sample
Chief Executives	689	84%
Board Chairs	131	16%
Total	820	--

¹ Not every dataset in this report has the same base sample size because respondents skipped some questions. Data in this report is calculated based on the number of respondents that answered that specific question.

BoardSource provided an open URL to each group so the survey could be broadly and easily shared.

It is important to note that while *Leading with Intent* provides valuable information around what is happening within boardrooms, because this sample is a convenience sample versus a representative or randomized sample, there are limitations to how much can be generalized to the broader public charity community. That said, it provides insight into the relative strengths and challenges of these organizations that may be applicable to the community more broadly.

BoardSource administered the survey using survey software licensed from Qualtrics and partnered with Harder+Company to conduct analyses of the data. All surveys were completed between April 23, 2019 and June 25, 2019.²

SURVEY ORGANIZATIONS

Annual Revenues	#	% of Sample
< \$250K	131	16%
\$250K-\$499K	85	11%
\$500K-\$1M	134	17%
\$1M-\$4.9M	279	35%
\$5M-\$9.9M	71	9%
\$10M-\$24.9M	60	7%
\$25M or greater	47	6%

Geographic Area	#	% of Sample
South	233	28%
West	219	27%
Midwest	199	24%
Northeast	154	19%
Outside of US	14	2%

Mission Area	#	% of Sample
Human/social services	311	38%
Arts and culture	91	11%
Education	85	10%
Health care	85	10%
Youth development	74	9%
Other	70	9%
Environment	37	5%
Social justice/civil rights	25	3%
Capacity building	20	2%
Philanthropy	14	2%
Business/industry	7	1%
International development/ foreign affairs	7	1%
Sports and recreation	7	1%

² It is important to note that the survey was conducted in 2019 before the outbreak of the COVID-19 pandemic. The pandemic has impacted the nonprofit sector in significant ways, and those impacts will not be reflected in the data shared in this report.

ACKNOWLEDGMENTS

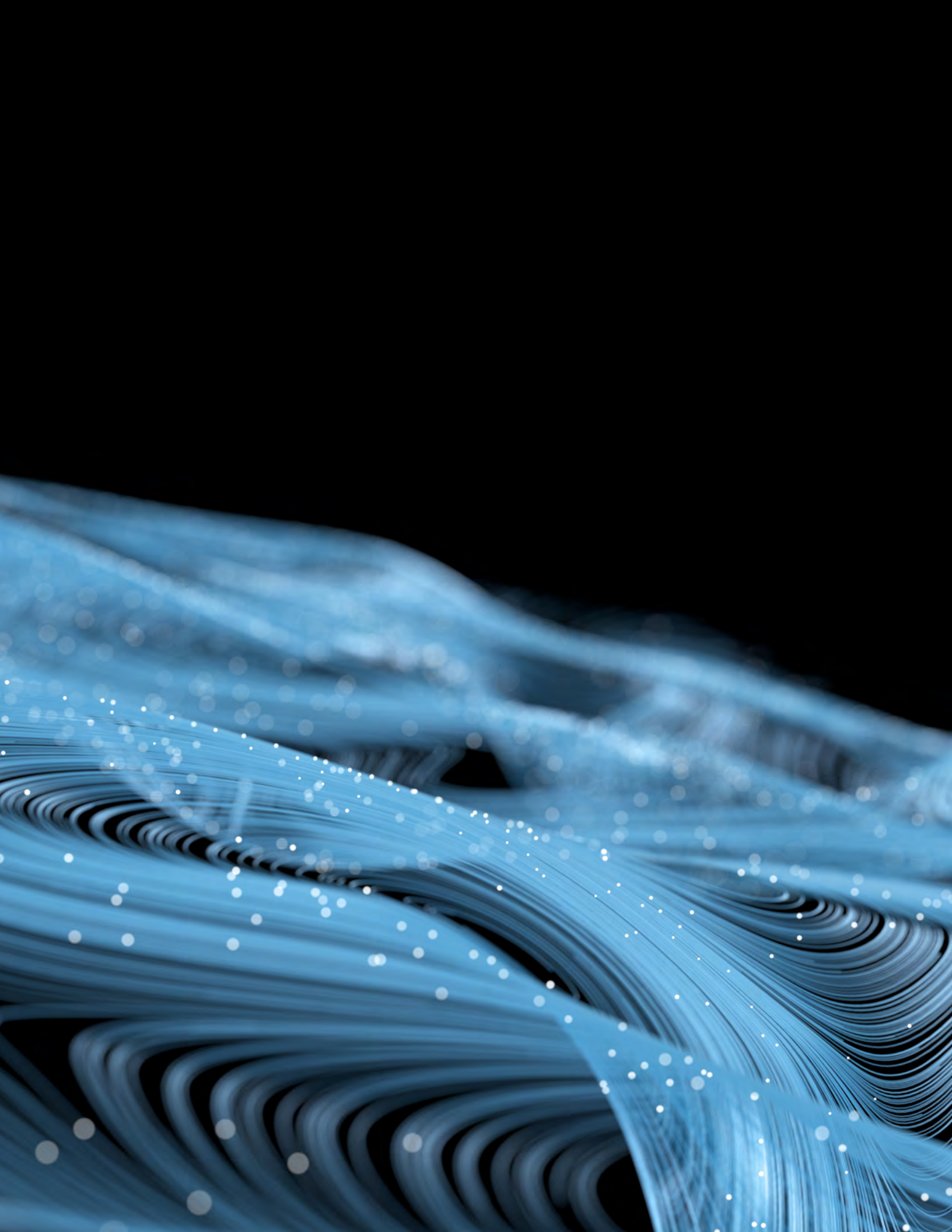
BoardSource could not have conducted *Leading with Intent* without the insights, guidance, support, and dedication of many leaders in the field of nonprofit governance and leadership. We want to thank the following groups, individuals, and organizations:

The Research Advisory Council shared valuable input on the survey questions, key analysis areas, key findings, and development of this report. The members of the council are:

- **Marla Bobowick**
Principal, Bobowick Consulting
- **Will Brown, Ph.D.**
Professor and director, Nonprofit Management Program, Bush School of Government & Public Service, Texas A&M University
- **Anne Cohn Donnelly, D.P.H.**
Former member of BoardSource's board of directors
- **Donald Haider, Ph.D.**
Professor emeritus of strategy, Kellogg School of Management, Northwestern University
- **Judith Millesen, Ph.D.**
Professor and director of MPA program, College of Charleston
- **Rick Moyers**
Independent consultant and member of BoardSource's board of directors
- **Una Osili, Ph.D.**
Associate dean for research and international programs and professor, Lilly Family School of Philanthropy, Indiana University
- **David Renz, Ph.D.**
Director, Midwest Center for Nonprofit Leadership, University of Missouri-Kansas City
- **Bill Ryan**
Adjunct lecturer in public policy, John F. Kennedy School of Government, Harvard University
- **Cathy Trower, Ph.D.**
President, Trower & Trower, Inc. and former member of BoardSource's board of directors
- **Sylvia Yee, Ph.D.**
Former member of BoardSource's board of directors

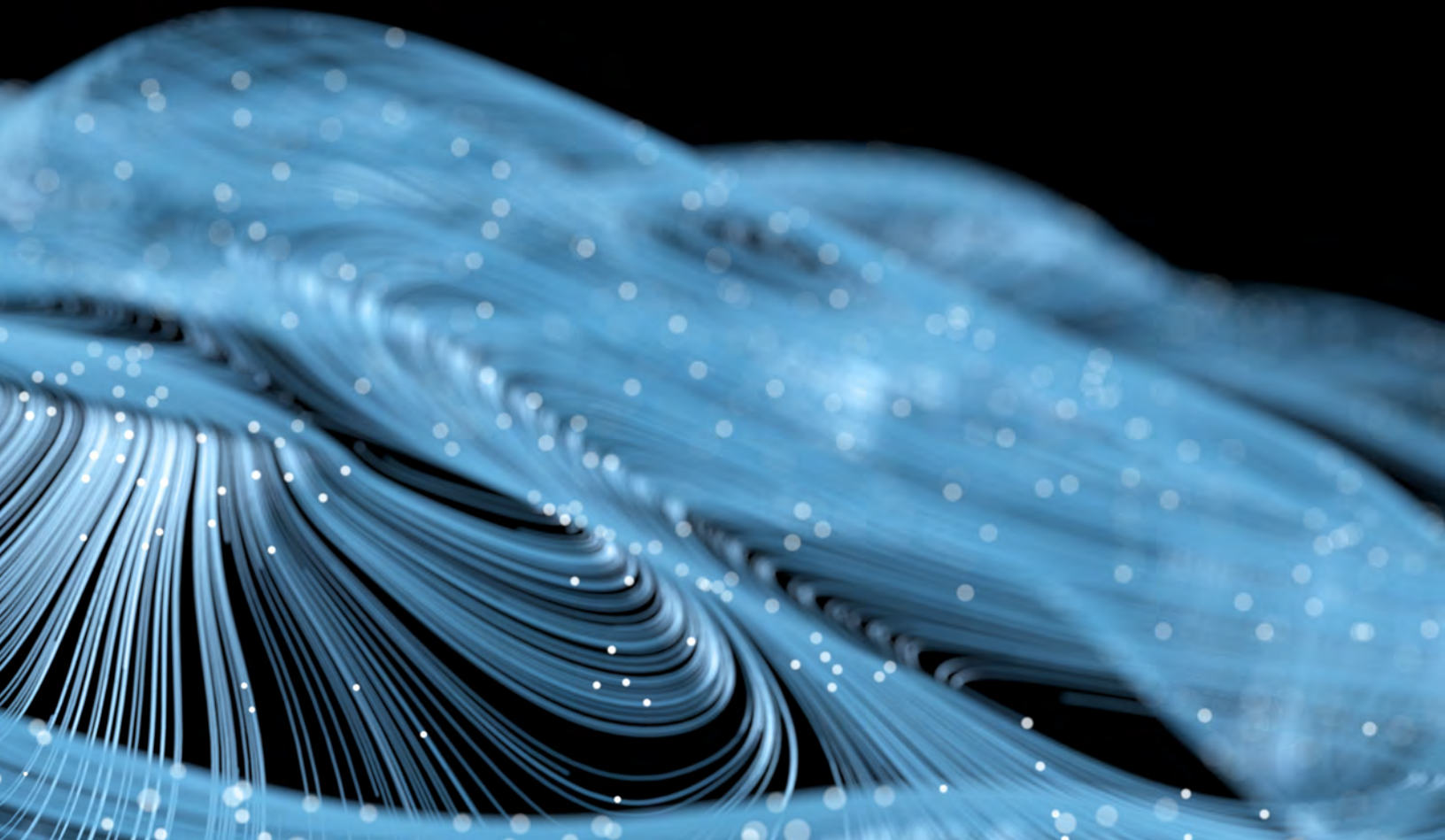
BoardSource also thanks those organizations that provided valuable input on the survey instrument and helped disseminate the survey to their networks, including The Alliance for Nonprofit Management, The Bridgespan Group, Building Movement Project, Candid, The Center for Effective Philanthropy, Change Philanthropy, CompassPoint, Council on Foundations, D5 Compass, Exponent Philanthropy, Grantmakers for Effective Organizations, Independent Sector, La Piana, National Committee for Responsive Philanthropy, National Center for Family Philanthropy, National Council of Nonprofits, The Nonprofit Quarterly, Propel Nonprofits, and The United Philanthropy Forum.

Finally, BoardSource also thanks the following organizations for their generous support of our leadership work: the Annenberg Foundation, the Barr Foundation, the Margaret A. Cargill Foundation, the Annie E. Casey Foundation, the Fidelity Charitable Trustees Initiative, the William and Flora Hewlett Foundation, the Conrad Hilton Foundation, the Gordon & Betty Moore Foundation, the Northwest Area Foundation, the Ralph M. Parsons Foundation, the Robert Wood Johnson Foundation, the Surdna Foundation, the UPS Foundation, and the Racial Equity in Philanthropy Fund, a donor collaborative housed at Borealis Philanthropy, which includes support from the Ford Foundation, W.K. Kellogg Foundation, Rockefeller Brothers Foundation, Conrad N. Hilton Foundation, and the Raikes Foundation.



THE WORK

What Boards Do & How Well They Do It



Board Performance Ratings

Chief executives and board chairs were asked to rate their board's performance across a range of board responsibilities. Both executives and board chairs gave higher grades around the board's role in oversight and lower grades around the board's engagement in external leadership and ambassadorship, such as advocacy and fundraising. Ratings are largely consistent with previous studies, including the fact that board chairs tend to rate their boards slightly higher than executives in most areas.

BOARD PERFORMANCE RATINGS		
Area of Board Performance	Chief Executives	Board Chairs
Understanding The Organization's Mission	B+	A-
Projecting a Positive Public Image of The Organization	B	B
Legal and Ethical Oversight	B	B
Financial Oversight	B	B
Knowledge of The Organization's Programs	B-	B
Providing Guidance To The Chief Executive	B-	B-
Level of Commitment and Involvement	B-	B-
Setting The Organization's Strategic Direction (In Partnership With The Chief Executive)	B-	B-
Understanding The Board's Roles and Responsibilities	B-	B-
Thinking Strategically as a Board	C+	B-
Monitoring Impact In The Context of The Strategic Goals Or Objectives	C+	B-
Understanding The Context (Funding Landscape, Public Policy Environment, Other Organizational Players, Etc.) In Which The Organization Is Working	C+	B-
Evaluating The Chief Executive's Performance Against Goals	C+	B-
Building Relationships Within The Community That Help Support and Inform The Organization's Work (Separate From Fundraising)	C+	C+
Building a Diverse and Inclusive Board With a Commitment To Equity	C	C+
Monitoring Legislative and Regulatory Issues	C-	C+
Leveraging Board Connections and Networks To Influence Public Policy Decisions	C-	C

Self-Reported Trends and Priorities in Board Performance

While there are not significant differences in aggregate ratings of board performance from previous studies, within this study's sample, there is a sense of positive momentum in terms of board performance, with more than 70% of chief executives and 80% of board chairs indicating that their board's performance has improved in the past three years. This question has not been asked in previous studies, so it is unclear if this is indicating a new sense of momentum or a general sense from CEOs and board chairs that their boards maintain a positive trajectory of performance.

How does the board's overall performance now compare to its performance three years ago?	Chief Executive	Board Chair
Much more positive now	39%	53%
Somewhat more positive now	32%	31%
About the same now	15%	13%
Somewhat more negative now	5%	3%
Much more negative now	1%	0%

Interestingly, not all areas of board performance are considered equally important by chief executives. When asked what areas of board performance were most important in terms of the CEO's expectations of the board, CEOs shared the following:³

RANKINGS OF AREAS OF BOARD PERFORMANCE BY LEVEL OF IMPORTANCE	
	Understanding The Organization's Mission
	Financial Oversight
	Understanding The Board's Roles and Responsibilities
	Thinking Strategically as a Board
	Level of Commitment and Involvement
	Setting The Organization's Strategic Direction (In Partnership With The Chief Executive)
	Projecting a Positive Public Image of The Organization
	Fundraising
	Legal and Ethical Oversight
	Building Relationships Within The Community That Help Support and Inform The Organization's Work (Separate From Fundraising)
	Knowledge of The Organization's Programs
	Evaluating The Chief Executive's Performance Against Goals
	Monitoring Impact In The Context of The Strategic Goals Or Objectives
	Building a Diverse and Inclusive Board With a Commitment to Equity
	Understanding The Context (Funding Landscape, Public Policy Environment, Other Organizational Players, Etc.) In Which The Organization Is Working
	Providing Guidance To The Chief Executive
	Leveraging Board Connections and Networks To Influence Public Policy Decisions
	Monitoring Legislative and Regulatory Issues

³ The question did not apply a forced ranking, so – hypothetically speaking – chief executives could have ranked everything as highest importance.

While these rankings of areas of board performance by level of importance provide important insights into chief executive perspectives, it's notable that CEOs may undervalue areas of performance that are related to oversight of the CEO's leadership of the organization and progress against goals and overvalue the board's role in fundraising.

It is also interesting to note how chief executives evaluate the use of board time, when asked where the board spends “not enough,” “just right,” and “too much” time.⁴ Those areas where a definitive majority (more than 60%) of chief executives felt that the board does not spend enough time are highlighted:

CHIEF EXECUTIVES: THE USE OF BOARD TIME			
Area of Board Performance	Not enough	Just right	Too much
Fundraising	76%	16%	1%
Building Relationships Within The Community That Help Support and Inform The Organization's Work (Separate From Fundraising)	67%	29%	0%
Building a Diverse and Inclusive Board With a Commitment To Equity	62%	28%	1%
Thinking Strategically as a Board	59%	37%	1%
Understanding The Context (Funding Landscape, Public Policy Environment, Other Organizational Players, Etc.) In Which The Organization Is Working	56%	39%	0%
Understanding The Board's Roles and Responsibilities	53%	44%	0%
Monitoring Impact In The Context of The Strategic Goals Or Objectives	53%	39%	1%
Leveraging Board Connections and Networks To Influence Public Policy Decisions	53%	30%	0%
Setting The Organization's Strategic Direction (In Partnership With The Chief Executive)	48%	48%	0%
Level of Commitment and Involvement	44%	53%	2%
Evaluating The Chief Executive's Performance Against Goals	44%	46%	2%
Knowledge of The Organization's Programs	41%	57%	2%
Monitoring Legislative and Regulatory Issues	41%	41%	1%
Projecting a Positive Public Image of The Organization	40%	58%	0%
Understanding The Organization's Mission	31%	67%	1%
Providing Guidance To The Chief Executive	29%	66%	2%
Legal and Ethical Oversight	26%	70%	1%
Financial Oversight	24%	67%	8%

If desired “time spent” is a proxy for level of priority, it is interesting to note that there are some areas where chief executives are consistent in their assessment of priority, and other areas where there may be some dissonance. Executives' assessments were consistent in the area of fundraising, rating it relatively high in the order of importance and saying that not enough time is spent on this area. There was dissonance in the following categories, with executives rating the category lower in terms of importance but saying that not enough time was spent on the area:

- Building a Diverse and Inclusive Board With a Commitment To Equity
- Understanding The Context In Which The Organization Is Working
- Building Relationships Within The Community That Help Support and Inform The Organization's Work (Separate From Fundraising)

⁴ The question also allowed CEOs to indicate that “no time” is spent on an activity, which was not included in percentages, since it did not include a qualitative assessment of appropriateness.

The Board's Three Functions

The board's most essential functions can be categorized in three main categories:

1. Setting direction and strategy
2. Providing oversight
3. Ensuring resources

While each of the board's three essential functions is critically important, BoardSource believes that "setting direction and strategy" is the most important of these responsibilities, as it defines the organization's fundamental purpose and direction on which all of the organization's work rests. There also seems to be evidence that boards may need to place greater emphasis on the strategic role of the board, based on current assessments of performance, importance, and time spent. In addition, fundraising (as a subcategory of "ensuring resources") may be receiving outsized focus. The following sections provide insights into how boards are performing in each of these areas.

Setting Direction & Strategy

The following is a summary of board performance in the areas related to setting direction and strategy, both directly and indirectly:

Area of Board Performance	Chief Executives	Board Chairs
Understanding The Organization's Mission	B+	A-
Knowledge of The Organization's Programs	B-	B
Providing Guidance To The Chief Executive	B-	B-
Setting The Organization's Strategic Direction (In Partnership With The Chief Executive)	B-	B-
Understanding The Board's Roles and Responsibilities	B-	B-
Thinking Strategically as a Board	C+	B-
Monitoring Impact In The Context of The Strategic Goals Or Objectives	C+	B-
Understanding The Context In Which The Organization Is Working (Funding Landscape, Public Policy Environment, Other Organizational Players, Etc.)	C+	B-
Building Relationships Within The Community That Help Support and Inform The Organization's Work (Separate From Fundraising)	C+	C+
Building a Diverse and Inclusive Board With a Commitment To Equity	C	C+
Monitoring Legislative and Regulatory Issues	C-	C+

While 78% of CEOs indicated that there is a formal strategic plan or framework for the organization, when asked what the board's impact is on defining strategic priorities, only one third of executives and half of board chairs reported the board's impact as very positive:

Board's impact on defining strategic priorities	Chief Executives	Board Chairs
Very positive	35%	52%
Somewhat positive	41%	34%
Neither positive or negative	16%	12%
Somewhat or very negative	8%	2%

Leading with Intent also finds that the board's focus on strategic versus operational issues matters. In both chief executive and board chair responses, those boards that lean toward strategic engagement receive higher ratings of board performance than those that lean more towards operational engagement.

Area of Board Performance	Average grade on a 4-point scale	Average grade when boards are primarily focused on...	
		Operational Issues	Strategic Issues
Evaluating the chief executive's performance against goals	2.21	1.86	2.51
Financial oversight	2.98	2.55	3.28
Fundraising	1.64	1.26	1.90
Legal and ethical oversight	2.83	2.38	3.12
Level of commitment and involvement	2.60	2.19	2.88
Monitoring impact in the context of strategic goals and objectives	2.12	1.57	2.47
Providing guidance to the chief executive	2.51	2.06	2.86
Setting the organization's strategic direction	2.42	1.65	2.95
Thinking strategically as a board	2.29	1.57	2.81
Understanding the board's roles and responsibilities	2.51	1.82	2.92
Understanding the context in which the organization is operating	2.17	1.61	2.50

Executives similarly rate boards higher on the board's impact on the organization when the board is focused on strategic issues vs. operational issues:

Rating of Board's Impact On...	Average grade on a 4-point scale	Average grade when boards are primarily focused on...	
		Operational Issues	Strategic Issues
Clearly defining strategic priorities for the organization	4.03	3.36	4.42
The organization's reputation for doing good work, within networks that are important to its mission	4.18	3.95	4.33
The financial resourcing of the Organization's work	3.65	3.22	3.93
The organization's ability to act on calculated risks to advance its goals	3.74	3.23	4.04
The organization's overall performance	4.02	3.53	4.30

Importantly, this finding does not seem to be simply a chief executive preference for less engagement or involvement from the board. *Leading with Intent* finds similar dynamics across two other questions around the board's strategic engagement:

Rating of Board's Impact On...	Average grade on a 5-point scale	Average grade when the Board...	
		generally accepts strategic recommendations without discussion	discusses organizational strategy to surface underlying assumptions
The organization's overall performance	4.02	3.58	4.28
Rating of Board's Impact On...	Average grade on a 5-point scale	Average grade when the Board...	
		is not involved in leading the strategy of the organization	is a partner in leading the strategy of the organization
The organization's overall performance	4.02	3.14	4.32

Providing Oversight

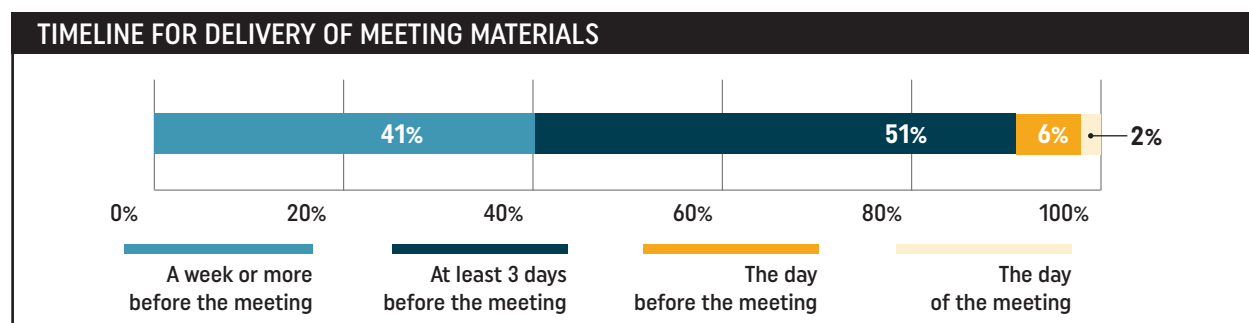
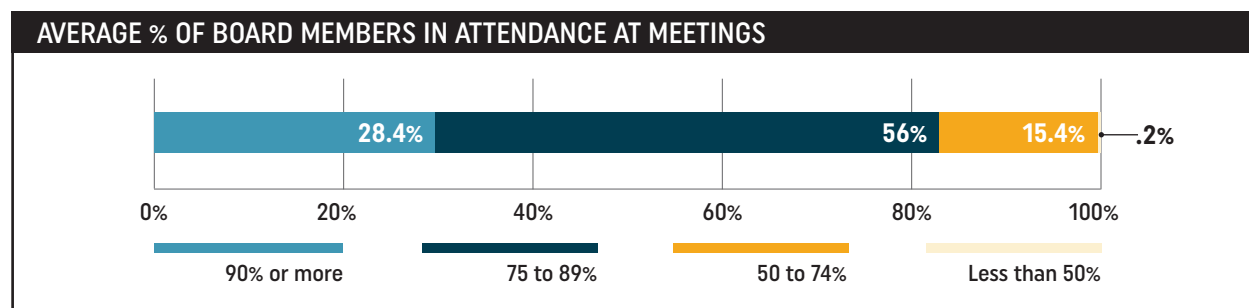
The following is a summary of board performance in the areas related to providing oversight, both directly and indirectly:

Area of Board Performance	Chief Executives	Board Chairs
Understanding The Organization's Mission	B+	A-
Legal and Ethical Oversight	B	B
Financial Oversight	B	B
Knowledge of The Organization's Programs	B-	B
Providing Guidance To The Chief Executive	B-	B-
Understanding The Board's Roles and Responsibilities	B-	B-
Monitoring Impact In The Context of The Strategic Goals Or Objectives	C+	B-
Evaluating The Chief Executive's Performance Against Goals	C+	B-
Building a Diverse and Inclusive Board With a Commitment To Equity	C	C+
Monitoring Legislative and Regulatory Issues	C-	C+

Meeting Attendance and Preparation

It may go without saying, but it is difficult for board members — and the board as a collective — to fulfill its oversight role if it is not fully informed and engaged, which is why board meeting attendance plays a critical role in board oversight. Boards report relatively strong and consistent board meeting attendance, with 84% of boards reporting that attendance is regularly above 75%. That said, only 28% of boards report regular attendance in the 90% or more range, which should be the goal.

Similarly, it is essential that board members have enough time to review meeting materials if they are to provide proper oversight. Given that board members tend to have busy schedules and significant responsibilities outside their volunteer board role, BoardSource recommends that meeting materials be sent out at least a week before the meeting — a practice that 41 percent of boards have adopted.



Financial Oversight

Proper board oversight helps ensure the organization acts appropriately to safeguard the resources entrusted by donors and the public. Boards seem to be doing pretty well with their financial oversight role, with both executives and board chairs giving their boards a B grade in this important oversight area.

Oversight of the CEO

The board’s oversight of the chief executive is their most essential oversight role. As the staff leader of the organization, the organization’s success rests largely on the shoulders of the executive, and the board is responsible for ensuring that the chief executive has the support, direction, and oversight needed to do that effectively.

Annual Performance Evaluation

While there are many aspects of CEO oversight, perhaps most important is the annual performance review, which provides a critical opportunity for boards and chief executives to align goals and expectations and address any lack of alignment or performance challenges. Unfortunately, there is room for significant improvement in this area, as only 53% of chief executives reported that they have had a formal, written evaluation in the past year and one in five executives (21%) reported that they have never had a formal evaluation of their performance.

As the CEO/ED, has your performance been formally evaluated in writing?	
Yes, within the past 12 months	53%
Yes, within the past 12 to 24 months	15%
Yes, more than 2 years ago	11%
No, the board has never formally evaluated my performance, but has done so informally	13%
No, the board has never evaluated my performance formally or informally, and I have been in the job for more than a year	8%

Leading with Intent also asks how effective the evaluation process was in providing clear feedback on performance and expectations moving forward. Responses indicate that boards have significant room for improvement in providing clear expectations for the future:

	Clear	Somewhat clear	Not at all clear
CEO clarity on the board’s assessment of their performance	71%	22%	6%
CEO clarity on the board’s expectations moving forward	53%	37%	10%

Compensation

The majority (55%) of boards report that they have a formal process for setting appropriate compensation for the chief executive, leaving 45% of boards without a formal process. Board chairs report the following factors in determining CEO compensation:

	Major Factor in Setting Compensation	Minor Factor in Setting Compensation	Not a Factor
Organization's performance	86%	10%	4%
Annual performance review	82%	14%	4%
Fundraising success	59%	33%	9%
External salary benchmarking	57%	35%	9%
Length of time in position	32%	45%	23%
Cost of living increase	26%	58%	27%
Staff retention rates	20%	53%	27%

BoardSource recommends that the full board approve any change in the chief executive's compensation package, a practice that 53% of boards have adopted.

Terms of Employment

The board is responsible for hiring the chief executive and making decisions about their continued tenure and employment. The vast majority (73%) of the chief executives surveyed do not have a written employment contract. Boards must understand that — without the protections of an employment contract — chief executives may feel more vulnerable in their employment status. Whether an employment contract is in place or not, if a board is focused on retaining their chief executive for the long-term, they should take care to ensure that the chief executive understands the value they bring to the organization through positive performance feedback and appropriately competitive compensation. Boards are wise to be thoughtful about this in any scenario, but it's especially important when viewed through an equity lens, as those chief executives with less of a financial safety net may feel especially vulnerable.

Other Essential Oversight Practices

Boards generally demonstrate a high level of adoption of essential oversight practices, but any exception to these practices is notable:

Essential Oversight Practices	% Adoption
Full board approval of the annual budget	97%
A written conflict of interest policy	96%
Annual disclosure process for conflicts of interest	90%
Written job description for the CEO/ED	87%
Board orientation process for new board members	85%
External financial audit	85%
Receive a copy of the IRS Form 990 prior to filing	85%
A whistleblower policy that includes a way for employees to report issues directly to the board.	85%
A formal strategic plan or framework	78%
A document retention and destruction policy	77%
Full board approval of changes in the CEO/ED's compensation	75%
Written positions or job descriptions for board members	74%
Full board approval of the IRS Form 990	62%
Written charters for committees	52%
Meet with auditors in executive session without staff present	30%
Written succession plan or policy to guide the board when CEO/ED transition occurs	29%
Written emergency backup plan for handling unexpected executive departures	27%
Executive sessions at every board meeting	26%

Ensuring Resources

While there is no question that boards and staff share the responsibility for appropriately resourcing the organization, boards — as fiduciaries of the organization — are where the proverbial buck stops in terms of ensuring that the organization has the financial, human, and relational resources it needs to pursue its mission and purpose.

Broadly, BoardSource defines the board's role in ensuring resources in a way that encompasses three dimensions:

1. **People** – The insights, expertise, and understanding to lead the organization and its work. The board's role focuses on the people of the board, the chief executive, and the budget and strategy that guides the way that the chief executive resources the organization in terms of other staff members.
2. **Money** – The financial capacity to support the people, systems, and programs that accomplish the organization's mission.
3. **Connection** – The ability to see, understand, and engage with individuals and other organizations so that the nonprofit can gain the trust and respect of those it seeks to serve and others within its community and ecosystem.

The following is a summary of board performance in the areas related to ensuring resources, both directly and indirectly:

Area of Board Performance	Chief Executives	Board Chairs
Understanding The Organization's Mission	B+	A-
Projecting a Positive Public Image of The Organization	B	B
Knowledge of The Organization's Programs	B-	B
Level of Commitment and Involvement	B-	B-
Understanding The Board's Roles and Responsibilities	B-	B-
Understanding The Context (Funding Landscape, Public Policy Environment, Other Organizational Players, Etc.) In Which The Organization Is Working	C+	B-
Evaluating The Chief Executive's Performance Against Goals	C+	B-
Building Relationships Within The Community That Help Support and Inform The Organization's Work (Separate From Fundraising)	C+	C+
Building a Diverse and Inclusive Board With a Commitment To Equity	C	C+
Monitoring Legislative and Regulatory Issues	C-	C+
Leveraging Board Connections and Networks To Influence Public Policy Decisions	C-	C
Fundraising	C-	C

This section focuses on planning for succession as it relates to “people” and the board’s role in fundraising and advocacy as it relates to “money” and “connection.” Other aspects of “people” and “connection” are covered in other areas of this report.

Planning for Succession

Never is the board’s role more important than in the moment of executive transition. Whether a planned or unplanned transition, the board’s responsibility is to navigate the organization through the transition. If the board falters in the midst of a transition, the results can be disastrous, making the board’s role in planning for succession critically important.

Leading with Intent finds mixed results as it relates to board preparedness for executive transition. While a strong majority (68%) of board chairs indicate that the board is well prepared to make informed decisions about how the organization should be led, more than a quarter (26%) do not have that confidence. This — combined with the fact that executive leadership is susceptible to quick, unanticipated change — is reason for some concern. Consider:

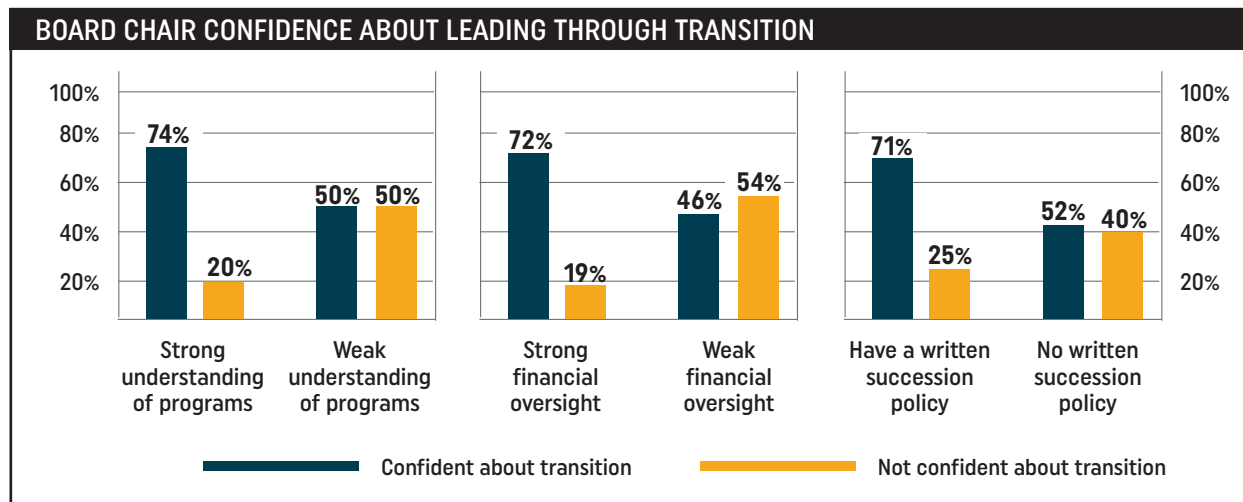
- Only 45% of chief executives report that they are “extremely satisfied” in terms of personal job satisfaction.
- 1 in 5 chief executives report that their boards have an “extremely” or “moderately” negative impact on their personal job satisfaction.
- 73% of chief executives are working without an employment contract.

Boards are wise to make efforts to boost their confidence and prepare themselves for a transition so that they can ensure resilience through the transition. *Leading with Intent* finds several factors that lead to higher degrees of board chair confidence about executive transition:

- Knowledge of the organization’s programs
- Strong financial oversight
- Presence of a succession plan

Other Essential Oversight Practices

Boards generally demonstrate a high level of adoption of essential oversight practices, but any exception to these practices is notable:



The Board's Role in Fundraising

As has been true in every study that BoardSource has done over more than 20 years, boards and executives continue to rate the board's role in fundraising as one of the lowest areas of board performance; in this study it was the lowest.

How important is fundraising in terms of your expectations for the board?	Chief Executive	Board Chair
Very important	70%	61%
Important	20%	24%
Somewhat important	7%	10%
Not at all important	3%	6%
How would you grade the board's performance in fundraising?	Chief Executive	Board Chair
Excellent	4%	8%
Above average	15%	17%
Average	33%	26%
Below average or Failing	48%	50%

While there is no question that boards have a role to play in raising funds for their organization, this frustration with board fundraising efforts may say as much about the expectations for performance as the performance itself. While it would be logical to assume that those boards that place higher importance on fundraising would score highly in terms of fundraising, this does not seem to be the case — the level of importance placed on fundraising does not vary significantly between those boards that get “A’s” in fundraising and those that receive failing grades.

	A	B	C	D	F
Very important	73%	78%	66%	67%	78%
Important	15%	17%	25%	20%	12%
Somewhat important	0%	3%	7%	9%	7%
Not at all important	12%	1%	2%	4%	3%

Even more important, however, is that *Leading with Intent* finds evidence that those boards that place the highest level of importance on fundraising have lower ratings in several key areas of performance as compared to those that do not place such high importance on fundraising:

Area of Performance	Level of Importance Placed on Fundraising			
	Very important	Important	Somewhat important	Not at all important
Building a diverse and inclusive board with a commitment to equity	2.47	2.58	2.55	2.89
Understanding the context in which the organization is operating	2.36	2.62	2.38	2.56
Monitoring impact in the context of strategic goals or objectives	2.24	2.41	2.30	2.50
Thinking strategically as a board	2.06	2.23	2.20	2.44
Providing guidance to the chief executive	2.10	2.25	2.43	2.39
Setting the organization's strategic direction	1.70	1.94	1.98	2.17

These findings suggest that boards that prioritize fundraising above all else when it comes to the board's role do so at the expense of organizational strategy, relevance, and impact.

Advocacy Performance

Nonprofit organizations do not operate in a vacuum. Policy decisions at the local, state, and federal level impact the way nonprofits do their work, whether its access to funding, laws and regulations that govern their work, or policy decisions that affect those they serve. By engaging in advocacy, nonprofit leaders ensure their missions and the people the organizations serves are not forgotten when important decisions are being made. While there is some evidence in this study that boards are more engaged in advocacy and public policy than in previous *Leading with Intent* studies, organizations are far from fully leveraging the potential for impact through advocacy. This may be in part due to challenges with board composition: 73% of executives and 71% of board chairs report that they do not have the right people on the board for influencing decision makers on policy decisions of relevance to the organization's work, mission, or goals.

EXTENT OF BOARD PARTICIPATION AND ENGAGEMENT IN ADVOCACY

		Chief Executive	Board Chair
Understand how public policy impacts your organization's mission.	To some extent (great, some, or small)	83%	83%
	Not at all	17%	17%
Connect the organization with community leaders and potential coalition partners.	To some extent	86%	94%
	Not at all	14%	6%
Work in concert with the chief executive and leadership team to educate policymakers on behalf of the organization.	To some extent	65%	77%
	Not at all	35%	23%
Allocate resources toward advocacy aligned with the organization's strategic goals.	To some extent	58%	66%
	Not at all	42%	34%

Board engagement in advocacy is especially important for organizations that receive public funding (65% of respondents) as their funding relies on government understanding and prioritization of their organizations' work. Unfortunately, within that subset of respondents:

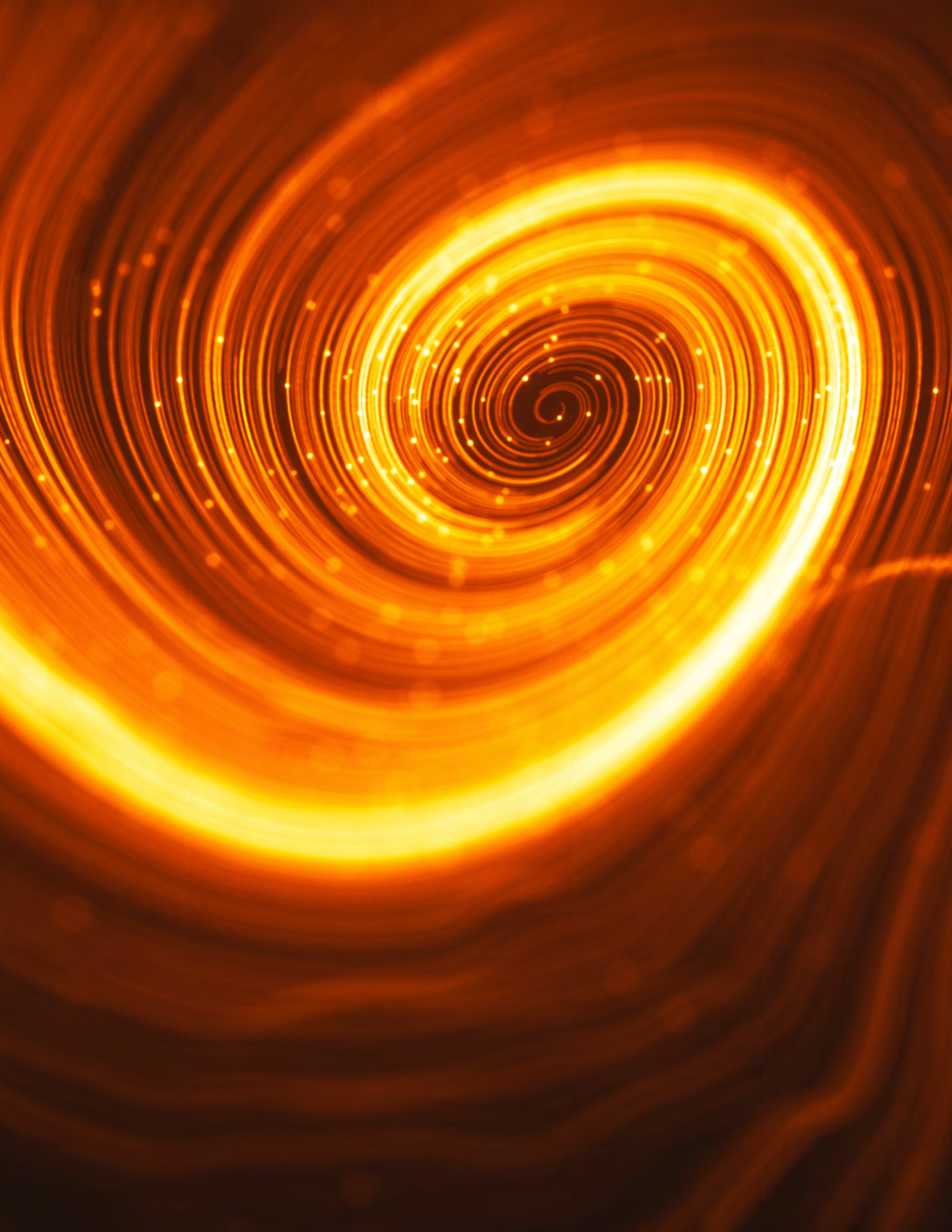
- Half of executives (54%) report that their board members do not understand or only understand to a small extent how public policy impacts the organization's mission.
- 72% of executives report that board members are "not" or "only to a small extent" allocating resources toward advocacy aligned with the organization's strategic goals.
- Two-thirds of executives (69%) report that board members are not working in concert with staff to educate policymakers on behalf of the organization, and 81% report that board members are not working in concert with staff to educate policymakers on behalf of the nonprofit sector.
- One third of executives (33%) have not discussed advocacy at all with the board.





THE PEOPLE

Who Boards Are and How They are Structured

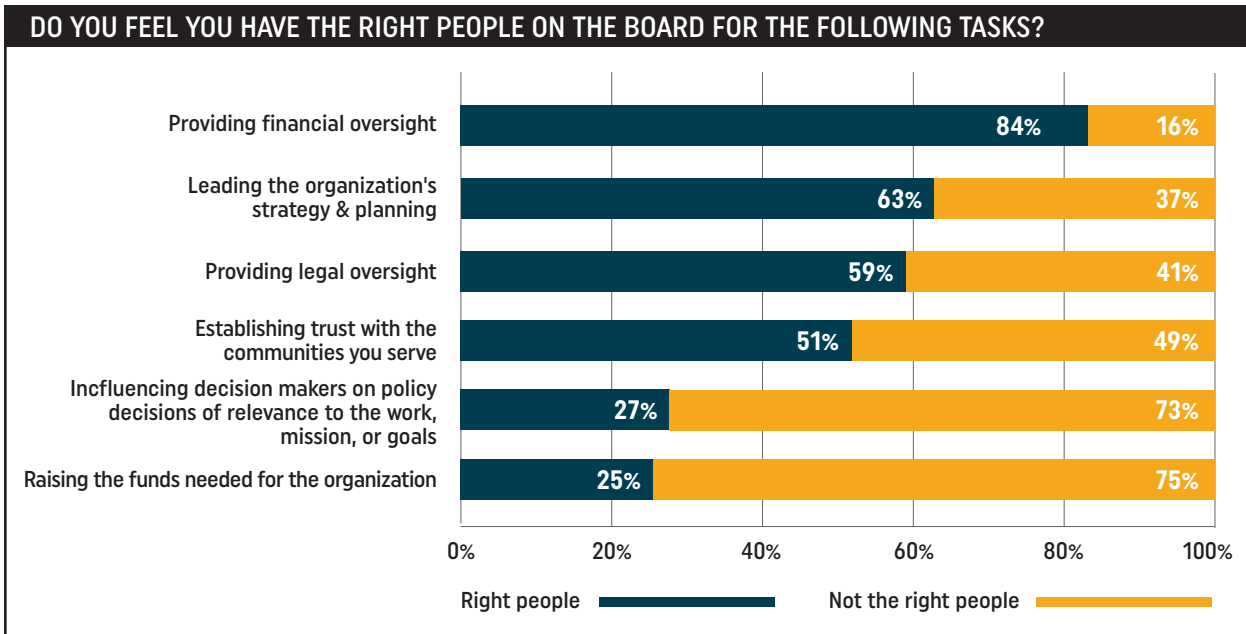


DEMOGRAPHIC SUMMARY OF BOARD & EXECUTIVE LEADERSHIP

Race & Ethnicity	Chief Executive	Board Chair	Board Members
White/Caucasian/European	87%	83%	78%
Black/African American/African	5%	6%	10%
Hispanic/Latino/Latina/Latinx	3%	5%	5%
Asian/Asian American/Pacific Islander	2%	2%	4%
Multi-Racial/Multi-Ethnic (2 or more races or ethnicities)	3%	2%	1%
Native America/American Indian/Indigenous	0.3%	0.4%	1%
Other race/ethnicity	1%	1%	2%
Gender & Gender Identity			
Female	74%	53%	53%
Male	26%	47%	47%
Non-Binary	0.3%	0.1%	0.1%
Not Transgender (Cisgender)	99.3%	99.6%	99%
Transgender	0.7%	0.4%	1%
Age			
Under 35	4.1%	4.1%	9%
35 to 44	16%	20%	21%
45 to 54	31%	25%	26%
55 to 64	38%	28%	26%
65 or older	11%	23%	17%
Disability Status			
Without disability	95%	97%	95%
With disability	5%	3%	5%
Sexual Orientation			
Heterosexual or Straight	90%	94%	94%
Gay, Lesbian, Bisexual	9%	6%	6%
Other	1%	0.1%	0.1%

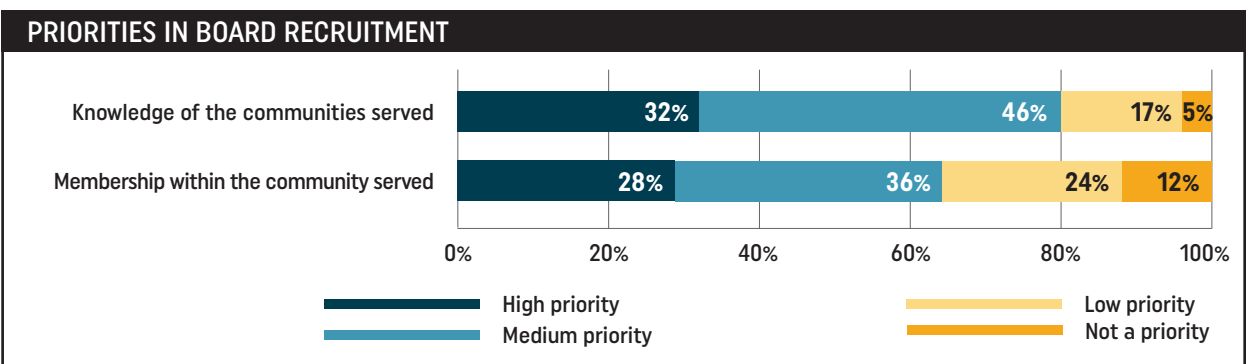
Self-Assessment of Board Composition

CEOs are much more likely to say they have the right people on boards when it comes to internal activities, like oversight, than external leadership and ambassadorship, like fundraising and advocacy.



This is especially important when you consider that these areas are places where executives have given their boards lower grades. Board recruitment processes should be reviewed to ensure that the board's composition is well-suited to carry out both the internal and external activities of the board's role.

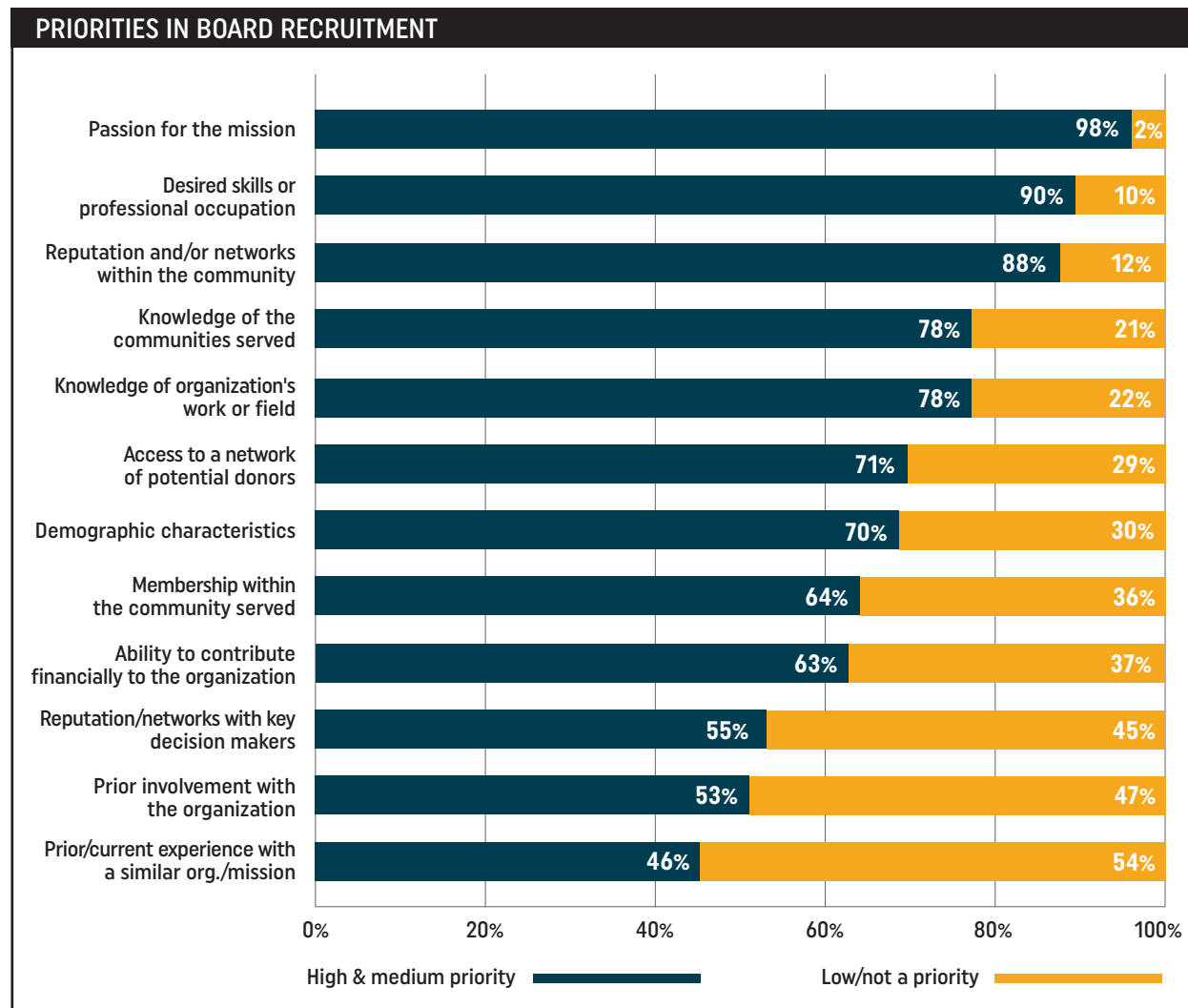
In addition, boards are disconnected from the communities they serve. As shown in the above chart, almost half of executives report that they do not have the right board members to “establish trust with the communities they serve.” Only a third of boards (32%) place a high priority on “knowledge of the community served,” and even fewer (28 percent) place a high priority on “membership within the community served.”



The individual leaders who compose nonprofit boards reflect an organization's values and beliefs about who should be empowered and entrusted with its most important decisions. When boards are populated in a way that disconnects them from the communities their organizations exist to serve, it signals that the organization is not in partnership with the community it seeks to serve. Perhaps even more problematic, it signals that the organizations see this as a perfectly acceptable way of operating.

Board Recruitment Priorities and Approaches

Leading with Intent invites respondents to share what is important to them when searching for new potential board members. Level of importance is not a forced ranking, which means that all areas could be considered “high priority” by respondents. This makes those areas that are rated as low – or lower – priority of particular interest:



Almost one third of executives (32%) and over half of board chairs (53%) report difficulty with finding people to serve on the board. The primary reasons cited for this difficulty include: the limited “supply” of interested individuals, the time commitment that is required to serve, and the challenge finding individuals with the desired skill set.

HOW EASY OR DIFFICULT IS IT TO FIND PEOPLE TO SERVE ON YOUR BOARD?

	Chief Executive	Board Chair
Very easy	6%	5%
Easy	24%	7%
Neither easy nor difficult	38%	34%
Difficult	26%	44%
Very difficult	6%	9%

WHY IS IT DIFFICULT TO FIND PEOPLE TO SERVE ON THE BOARD?

	Chief Executive	Board Chair
Finding individuals with the desired skill set	58%	81%
Limited "supply" of individuals interested in serving on boards	57%	60%
Finding individuals with community connections	57%	57%
Finding individuals with fundraising experience	54%	60%
Time commitment required	50%	64%
Finding individuals with the desired content expertise	38%	52%
Other	25%	17%
None of the above	2%	2%

Interestingly, those organizations that define the desired mix of diversity, skills, and connections that the board needs — a practice that 60% of organizations have adopted — and that use that as a starting point for board recruitment were more likely to report that finding new board members was easier than organizations that did not. This suggests that the more targeted boards are in their recruitment efforts, the easier board recruitment ends up being.

DO YOU COMPARE CURRENT BOARD COMPOSITION TO DESIRED BOARD COMPOSITION AS A STARTING POINT FOR IDENTIFYING BOARD RECRUITMENT PRIORITIES?
HOW EASY OR DIFFICULT IS IT TO FIND NEW BOARD MEMBERS?

	Organization has compared the desired mix...	Organization has not compared the desired mix...
Easy	37%	25%
Neither Easy Nor Difficult	36%	35%
Difficult	27%	40%

There is also evidence that boards are more open to non-traditional methods of board recruitment than BoardSource has found in previous studies. While tapping board members' and chief executives' networks are still the most commonly noted methods for identifying potential board candidates (96% and 88% of chief executives note that their boards deploy these methods, respectively), there are encouraging signs about the deployment of methods that may open boards up to more diverse networks, including:

- Leaders from the communities the organization serves (67%)
- Referrals from leaders in the communities the organization serves (56%)
- Program participants or former participants (45%)
- Leaders from peer or partner organizations (42%)
- Publicly posted or advertised board openings (22%)
- External headhunter, agency, or board matching service (5%)

Board Chair Selection

Given the importance of the board chair’s role, this *Leading with Intent* study took a closer look at how board chairs are selected for their role. While the feedback from both chief executives and board chairs about the selection process was overwhelmingly positive, there are clearly some boards that is evidence that some boards face challenges here.

Chief Executive Perspectives	% Yes
We elected a chair who was well respected by the rest of the board	74%
We elected a chair who was well qualified	67%
We elected a chair who was looking forward to serving as our chair	65%
We elected a chair who was well prepared	54%
As chief executive, I was invited to share perspectives on how effectively I could partner with the chair candidate prior to their election	33%
We elected a chair who was the only person willing to serve	22%
Board Chair Perspectives	% Yes
Board chair was the only person willing to serve	39%
Is this this first time you have served as a board chair?	62%

TRENDS IN BOARD STRUCTURE

Average Number of Committees	4.1
Standing Committees	Audit & Finance (82%) Development/Fundraising (76%) Governance & Nominating (71%) Executive (61%) Planning & Strategy (28%) Marketing & PR (19%) Program (13%)
Approach to Term Limits	Have both terms and term limits (54%)* Do not have both terms and term limits (46%)
Length of Terms	4+ years (3%) 3 years (73%) 2 years (18%) 1 year (2%) No terms (5%)
Maximum Number of Terms that Can be Served	4 or more (6%) 3 terms (24%) 2 terms (46%) 1 term (<1%) No limit (24%)
Average Total Number of Meetings in the Last 12 Months	7.5
Average Total Amount of Hours Board Met in the Last 12 Months	19.5
Average Meeting Attendance	90% or more members regularly attend meetings (28%) 75-89% of members regularly attend (56%) 50-74% of members regularly attend (15%) Less than 50% regularly attend (<1%)
Approach to Executive Sessions	<i>Frequency:</i> Every meeting (26%)* Periodically (66%) Never (9%) <i>Participation:</i> Both with and without the CEO (64%)* Only without the CEO (22%) Only with the CEO (13%)

* A BoardSource-recommended practice.

THE CULTURE

How Boards Operate as a Group



Overall, both chief executives and board chairs give their boards high marks as it relates to the board's culture — the way that it operates as a collective. They are also relatively aligned on their characterizations of the board's culture, with relatively small variances in CEO and Chair perspectives.

Average rating out of 5 (5-strongly agree, 4-agree, 3-neither agree nor disagree, 2-disagree, 1-strongly disagree)	Average of CEO Ratings	Average of Chair Ratings
Our board members are committed to our work	4.46	4.46
Board members listen attentively and respectfully to each other	4.39	4.50
Our board is able to work together toward a common goal	4.36	4.48
Most board members are eager to stay on the board for the maximum time allowed in the bylaws	4.27	4.23
Success is celebrated on the board	4.14	4.32
There is honest communication between board members	4.08	4.22
The board is able to resolve internal conflicts in a professional way	4.06	4.18
The board encourages creativity and innovation	3.88	4.13
Our board members share clearly articulated core values that guide decision making	3.78	4.10
The board encourages higher performance from its members and from the organization	3.53	3.90
Board members take collective responsibility for failures and mistakes	3.35	3.67
Our board has social time that enables board members to get to know each other outside of structured board meetings	3.33	3.48

Once again, *Leading with Intent* finds a relationship between social time amongst board members and stronger indicators of board culture. Boards that report that they had at least two and a half hours of board social time within the past year reported higher culture scores when looking at an average across culture questions as compared to those boards that did not have any social time in the past year. The most significant variances were in these areas of board culture:

	No social time	0.5 - 2 hours	Overall Average	2.5 - 4.75 hours	5 - 7 hours	8 - 10 hours	Greater than 10 hours
Success is celebrated on the board	3.67	3.89	4.14	4.23	4.34	4.39	4.39
The board encourages higher performance from its members and from the organization	2.99	3.40	3.53	3.65	3.80	3.66	3.50
Board members take collective responsibility for failures and mistakes	2.85	3.21	3.35	3.49	3.55	3.53	3.35

Similar dynamics were seen on questions related to inclusion. These two questions also elicited higher average responses from respondents who also reported at least 2 and a half hours of social time in the previous year:

	No social time	0.5 - 2 hours	Overall Average	2.5 - 4.75 hours	5 - 7 hours	8 - 10 hours	Greater than 10 hours
The Board has created a culture that supports open robust discussions	2.91	3.08	3.26	3.36	3.42	3.45	3.53
The Board has created a culture that ensures all voices are heard	2.76	2.88	3.13	3.19	3.28	3.33	3.44

While average culture scores generally increase in tandem with increased board social time, it is interesting to note that there is a dynamic with some aspects of culture where average scores decrease once the social time increases beyond 8-10 hours in a 12-month period. This may indicate that there is a “sweet spot” for board social time in the 5-8 hours per year range.

Board Chair as Steward of Board Culture

The board chair plays an especially important role in cultivating and supporting the board’s culture. In their role, board chairs set formal and informal norms about how the board operates, and how it deals with board successes and challenges.

Leading with Intent analyzed which aspects of board chair performance seemed to be most closely correlated to higher average culture ratings. When executives rated their chairs higher in terms of the board chair’s performance, the executive was more likely to rate the board higher than the average across all areas of board culture.

While *Leading with Intent* cannot determine causation or even directionality, it may be helpful for boards that are having culture challenges to consider the ways in which changes in board chair engagement in key areas could make a difference.

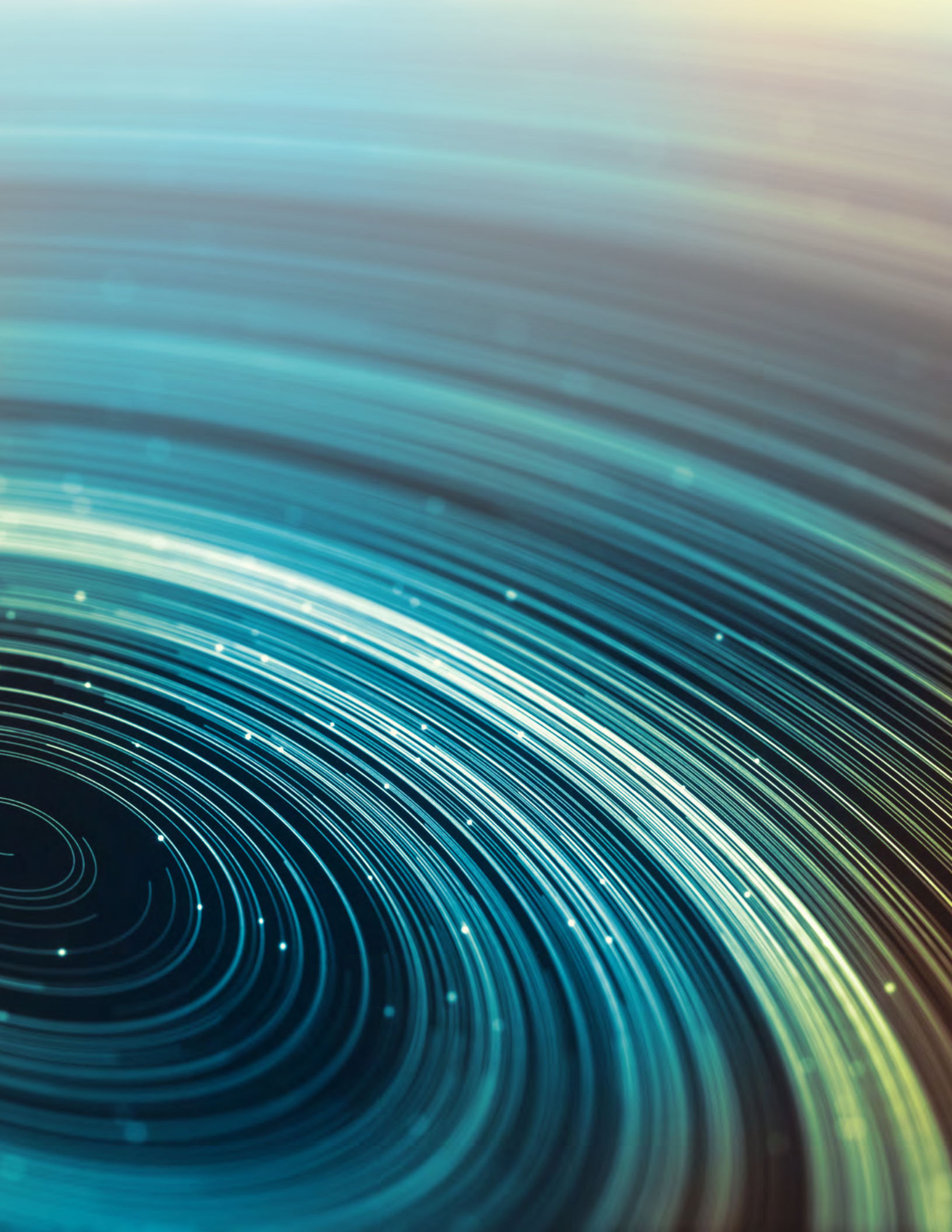
Here is a summary of executives' grades of board chair performance and overall board culture ratings in the two culture areas where there were the largest variances from the average:

Area of Board Chair Performance	Board members take collective responsibility for failures and mistakes			The board encourages higher performance from its members and the organization		
	Average Overall Grade of Culture Factor	Average Grade when Board Chairs Receive...		Average Overall Grade of Culture Factor	Average Grade when Board Chairs Receive...	
		A or B Grade	D or F Grade		A or B Grade	D or F Grade
Ensuring that there are clear expectations of board service	3.35	3.70	2.36	3.53	3.88	2.43
Encouraging board members to frame strategic questions		3.63	2.37		3.81	2.34
Ensuring decision making is shared amongst all board members		3.60	2.28		3.76	2.32
Ability to resolve conflict, build consensus, and reach compromise to enable the board to move forward		3.61	2.24		3.76	2.24
Fostering an environment that builds trust among board members		3.52	2.36		3.70	2.24



THE IMPACT

What Matters Most When It Comes to Board Leadership?



In this section, we will look not only at how the board is impacting the organization, but we will also examine what seems to matter most in terms of the board's impact.

As one would hope, the overwhelming majority of chief executives and board chairs report that the board has a positive impact on the organization across a number of key categories:

WHAT IMPACT DOES THE BOARD HAVE ON THE FOLLOWING?			
		Chief Executive	Board Chair
Clearly defining strategic priorities for your organization?	Positive Impact	76%	84%
	Neither positive nor negative	16%	14%
	Negative Impact	8%	2%
Your organization's reputation for doing good work, within networks that are important to your mission?	Positive Impact	81%	89%
	Neither positive nor negative	17%	10%
	Negative Impact	2%	1%
Your organization's overall performance?	Positive Impact	79%	87%
	Neither positive nor negative	16%	12%
	Negative Impact	6%	1%
The financial resourcing of your organization's work?	Positive Impact	63%	76%
	Neither positive nor negative	24%	21%
	Negative Impact	14%	4%
Your organization's ability to act on calculated risks to advance its goals?	Positive Impact	63%	73%
	Neither positive nor negative	26%	23%
	Negative Impact	11%	5%

The Board's Impact on Organizational Performance

Beyond what chief executives and board chairs say directly about board impact on organizational performance, *Leading with Intent* also examines which board practices or factors may be related to stronger or more positive board impact on organizational performance. There are several factors that stand out:

- Board composition
- Role understanding
- Board self-assessment practices
- Strong understanding of programs

The Impact of Board Composition

There is a clear relationship between board composition and the board's ability to positively impact organizational performance:

- Executives who report that they have the right people on the board are more likely to also report that their boards are having a positive impact on the organization.
- Executives who report that they do not have the right people on the board are more likely to also report that the board is having a negative impact on the organization.

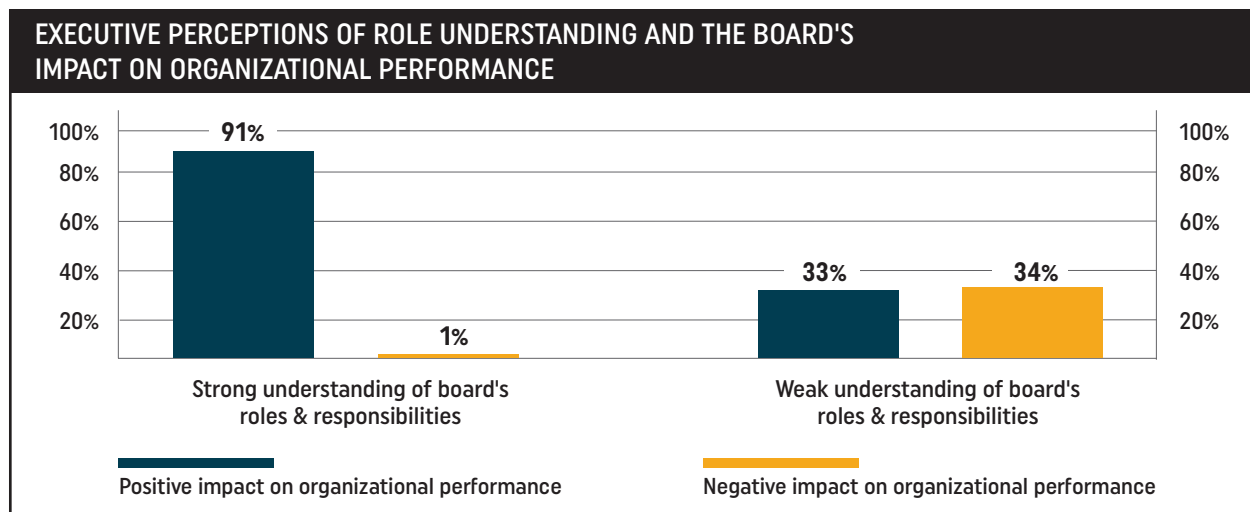
Executives were asked to reflect on whether or not their board had the right people for a range of board functions:

Do you have the right people for...		Board's Impact on the Organization:	
		Positive	Negative
Leading the organization's strategy	Right people	83%	3%
	Not the right people	72%	10%
Establishing trust with the community served	Right people	86%	4%
	Not the right people	71%	8%
Raising the funds needed	Right people	87%	3%
	Not the right people	75%	7%
Influencing decision makers on policy	Right people	88%	2%
	Not the right people	75%	7%
Providing financial oversight	Right people	84%	2%
	Not the right people	48%	26%

While this positive and negative correlation existed across all areas of board composition, it is interesting to note that there seems to be an especially strong relationship between boards whose executives indicate that they do not have the right people to provide financial oversight and those boards that are reported to be having a negative impact on the organization.

Impact of Role Understanding

Leading with Intent once again finds a connection between the board's impact on the organization and its understanding of its own roles and responsibilities.



There is also evidence that strong understanding of the board's role is related to stronger performance across all other areas of board performance. Here is a summary of how executives rated their boards on understanding its role compared to the grades in other areas of board performance:

AREA OF BOARD PERFORMANCE RATINGS REPORTED BY EXECUTIVES			
Area of Board Performance (Rated on a four-point GPA scale, 0=F, 1=D, 2=C, 3=B, 4=A)	Strong role	Weak role	Variance
Setting the organization's strategic direction	2.91	1.15	1.75
Thinking strategically as a Board	2.79	1.07	1.72
Financial oversight	3.39	1.79	1.60
Legal and ethical oversight	3.26	1.73	1.53
Providing guidance to the chief executive	2.93	1.49	1.44
Monitoring impact in the context of the strategic goals or objectives	2.51	1.10	1.42
Evaluating the chief executive's performance against goals	2.62	1.22	1.39
Understanding the context in which the organization is working	2.50	1.29	1.22
Level of commitment and involvement	2.99	1.83	1.16
Projecting a positive public image of the organization	3.25	2.10	1.15
Fundraising	1.97	0.95	1.02
Building relationships within the community that help support and inform the organization's work	2.31	1.32	1.00
Monitoring legislative and regulatory issues that have the potential to impact the organization	1.92	0.98	0.94
Building a diverse and inclusive board with a commitment to equity	2.09	1.18	0.91
Understanding the organization's mission	3.52	2.65	0.88
Knowledge of the organization's programs	2.86	2.06	0.80
Leveraging board connections and networks to influence public policy decisions that have the potential to impact the organization's work	1.81	1.20	0.61

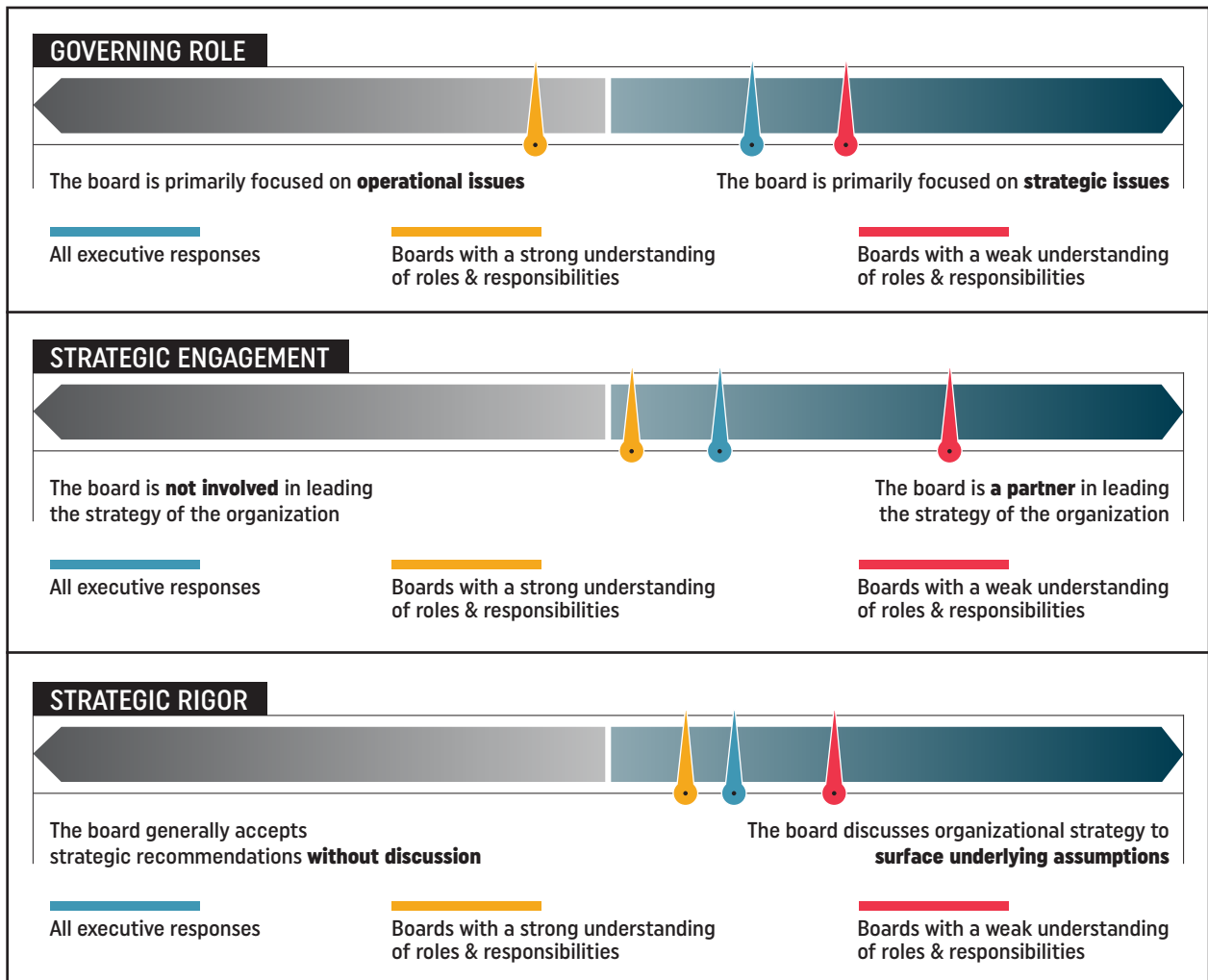
It is notable that the largest variances between boards with strong versus weak role understanding is in the space of strategy, which may indicate that executives are more willing to engage the board in strategy when they have confidence that the board understands its role and is less likely to step out of it.

This theory seems to be supported by an analysis of ratings on role understanding and how they related to the board's calibration on strategic engagement. Executives were asked to place their boards on the spectrum of three different dimensions:

- **Governing Role:** Is the board primarily focused on strategic issues or operational issues?
- **Strategic Engagement:** Is the board a partner in leading the strategy of the organization?
- **Strategic Rigor:** Does the board discuss organizational strategy to surface underlying assumptions or generally accept strategic recommendations without discussion?

Across all three of these dimensions, boards that were reported to have strong role understanding were calibrated more toward the strategic engagement end of the spectrum than the sample overall and very significantly above those boards reported to have weak role understanding. In the following charts, you can see how executives rated their boards on the spectrum between the statement on the left and the statement on the right and the differences in these ratings based on how executives graded their board's understanding of its roles and responsibilities.

Executives were asked to reflect on whether or not their board had the right people for a range of board functions:



Impact of Regular Board Self-Assessment

Once again, *Leading with Intent* finds a relationship between board self-assessment practices and ratings of board performance. Executives with boards that regularly assess themselves (in the past 2 years) also rate their boards higher across all areas of board performance than those that assess themselves less frequently and even more highly than those that have never assessed their own performance. This supports BoardSource's recommendation that boards assess their performance at least every two years:

AREA OF BOARD PERFORMANCE RATINGS REPORTED BY EXECUTIVES				
Area of Board Performance (Rated on a four-point GPA scale, 0=F, 1=D, 2=C, 3=B, 4=A)	Assessed in past 2 years	Assessed ever	Never assessed	Variance*
Setting the organization's strategic direction	2.68	2.45	2.11	0.57
Monitoring impact in the context of the strategic goals or objectives	2.36	2.17	1.81	0.55
Evaluating the chief executive's performance against goals	2.47	2.15	1.94	0.53
Financial oversight	3.18	3.09	2.68	0.50
Providing guidance to the chief executive	2.72	2.62	2.22	0.50
Thinking strategically as a Board	2.50	2.28	2.05	0.46
Understanding the Board's roles and responsibilities	2.67	2.61	2.26	0.41
Building a diverse and inclusive Board with a commitment to equity	2.00	1.67	1.59	0.40
Level of commitment and involvement	2.77	2.64	2.38	0.40
Monitoring legislative and regulatory issues that have the potential to impact the organization	1.83	1.57	1.47	0.36
Understanding the context in which the organization is working	2.31	2.21	1.97	0.34
Fundraising	1.79	1.60	1.47	0.32
Legal and ethical oversight	2.94	2.94	2.63	0.30
Building relationships within the community that help support and inform the organization's work	2.13	2.05	1.92	0.21
Projecting a positive public image of the organization	3.01	3.04	2.81	0.20
Understanding the organization's mission	3.34	3.26	3.20	0.15
Knowledge of the organization's programs	2.69	2.56	2.54	0.14
Leveraging Board connections and networks to influence public policy decisions that have the potential to impact the organization's work	1.68	1.57	1.56	0.13
Average across all categories of board performance	2.50	2.36	2.15	0.36

* Variance between those boards that have assessed their performance in the past two years and those that have never assessed performance.

Impact of Strong Understanding of Programs

Leading with Intent also finds a relationship between the board's knowledge of the organization's programs and their impact on organizational performance. Executives who rated their boards as having a strong knowledge of programs gave their boards higher grades on average across other areas of board performance, especially as it relates to strategy, engagement, and external leadership, including fundraising. The following table shows the variance between board performance grades when executives reported that their boards have a strong vs. weak understanding of programs:

		Strong knowledge of programs	Weak knowledge of programs	Variance
Strategic thinking & planning	Setting the organization's strategic direction	2.72	1.47	1.25
	Monitoring impact in the context of the strategic goals or objectives	2.45	1.24	1.22
	Thinking strategically as a board	2.60	1.47	1.13
Engagement & commitment	Level of commitment and involvement	2.89	1.86	1.03
External leadership & ambassadorship	Understanding the context in which the organization is working	2.46	1.45	1.01
	Projecting a positive public image of the organization	3.23	2.34	0.89
	Community-building and outreach	2.30	1.64	0.66
	Fundraising	1.87	1.32	0.55

The Board's Impact on the Chief Executive

Leading with Intent also analyzed questions that help illuminate how the board impacts the chief executive. The two primary lenses through which board impact was evaluated were:

- Partnership and support
- Chief executive job satisfaction

Partnership & Support

Overall, chief executives and boards give their boards decent but not exceptional marks in areas of relevance to their partnership:

	Chief Executives	Board Chairs
Providing Guidance To The Chief Executive	B-	B-
Setting The Organization's Strategic Direction (In Partnership With The Chief Executive)	B-	B-
Evaluating The Chief Executive's Performance Against Goals	C+	B-

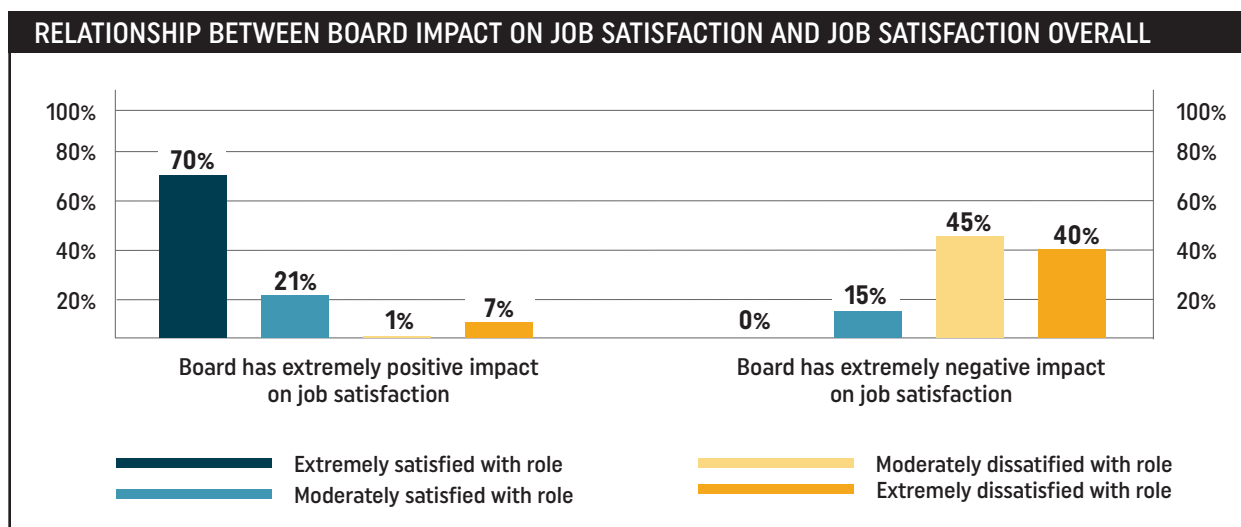
There are encouraging signs, however, about the strength of the partnership between chief executives and board chairs. When asked who they consider to be their best “go-to” person when they need to consult frankly on a tough decision, chief executives’ top choice was their board chair. Seventy percent of chief executives said that their board chair was in their “top two” people to consult – outranking the organization’s senior staff (44%), other current board members (31%), an outside mentor (29%), a spouse or partner (15%), or a former board member (7%).

Job Satisfaction

The vast majority of chief executives respond that they are satisfied with their jobs and say that their boards have a positive impact on their level of satisfaction, but it is notable that responses for many indicate moderate — rather than extreme — positive feelings:

HOW WOULD YOU RATE YOUR PERSONAL JOB SATISFACTION?		WHAT KIND OF IMPACT DOES YOUR BOARD HAVE ON YOUR LEVEL OF PERSONAL JOB SATISFACTION?	
	Chief Executive		Chief Executive
Extremely satisfied	45%	Extremely positive	27%
Moderately satisfied	40%	Moderately positive	46%
Neither satisfied nor dissatisfied	2%	Neither positive nor negative	8%
Moderately dissatisfied	8%	Moderately negative	16%
Extremely dissatisfied	5%	Extremely negative	3%

Importantly, there is a relationship between the board's impact on chief executive job satisfaction and overall job satisfaction, as highlighted by a breakdown of those chief executives who report that the board has an extremely positive impact on job satisfaction and those chief executives who report that the board has an extremely negative impact on job satisfaction:



Leading with Intent drills down to understand in what ways the board is positively or negatively impacting chief executive job satisfaction. In response to the question, “What are the two factors that most significantly affect the board’s impact on your personal job satisfaction (either positively or negatively)?”, chief executives shared the following:

	Chief Executive
The extent to which the board adds value and perspective as a part of strategic conversations	43%
The extent to which the board allows you to lead your organization autonomously and independently.	31%
The extent to which the board sees their responsibility for the success (or failures) of your organization	30%
Working relationship with the board chair	28%
The extent to which the board understands the distinct roles of the board and staff	27%
The amount of money that the board raises for your organization	22%
The extent to which the board sees CEO as responsible for the success (or failures) of your organization	14%
The amount of money that the board gives to your organization	3%
Other	1%

Further analysis reveals an interesting distinction between chief executives who indicate that the board has a negative impact on their job satisfaction and those who said that the board has a positive impact on their job satisfaction. For responses to “what impacts your personal job satisfaction most (either positively or negatively), the largest “gap” between these two cohorts was on the question of how much money the board raises for the organization. This may indicate that — when it comes to CEO job satisfaction — the board’s role in fundraising plays an outsized role. The following chart shows how executives rated each factor in terms of the impact on their satisfaction based on whether they said the board overall had a positive or negative impact on their satisfaction.

FACTORS IMPACTING CEO JOB SATISFACTION			
	Board’s Impact on the CEO’s Job Satisfaction is...		“Gap” between rating of factor for boards having a positive vs. negative impact
	Positive	Negative	
The amount of money that the board raises for your organization.	14%	41%	27%
The extent to which the board adds value and perspective as a part of strategic conversations.	47%	28%	19%
Your working relationship with the board chair.	32%	16%	17%
The extent to which the board allows you to lead your organization autonomously and independently.	35%	20%	15%
The extent to which the board sees their responsibility for the success (or failures) of your organization.	27%	36%	9%
The extent to which the board sees CEO as responsible for the success (or failures) of your organization.	13%	19%	6%
The amount of money that the board gives to your organization.	2%	7%	5%
The extent to which the board understands the distinct roles of the board and staff.	28%	30%	2%



This data book includes all of the frequency data for public charities, including chief executive and board chair responses.

Demographics	48	Organization Performance	70
Board Diversity, Inclusion, and Equity Practices	50	Board Culture	70
Board Recruitment	54	Board Chair Performance	72
Board Member Onboarding Process	57	Board Policies and Practices	73
Board Performance	58	Board Terms and Limits	74
Essential board roles	58	Board Committees	74
Engagement and leadership	60	Board Meetings	75
Programs and Strategy	62	Board Chair Experience	76
Board Self-Assessment	64	Executive Compensation	77
Fundraising	65	Executive Perspectives	78
Advocacy/Public Policy	66		
Partnerships	67		
Board Impact	69		

Demographics

With which of the following racial or ethnic groups do you identify?	Chief Executives	Board Chairs
Asian/Asian American/Pacific Islander	1.5%	2.4%
Black/African American/African	4.7%	6.3%
Hispanic/Latino/Latina/ Latinx	3.3%	5.0%
Native America/American Indian/Indigenous	.3%	.4%
White/Caucasian/European	86.5%	83.4%
Multi-Racial/Multi-Ethnic (2 or more races or ethnicities)	2.8%	2.0%
Other race/ethnicity	.9%	.5%

How many of the board's voting members are in the following racial or ethnic groups?	Board Members
Asian/Asian American/Pacific Islander	3.5%
Black/African American/African	9.6%
White/Caucasian/European	75.3%
Native America/American Indian/Indigenous	0.9%
Hispanic/Latino/Latina/Latinx	5.2%
Other race/ethnicity	1.6%
Multi-Racial/Multi-Ethnic (2 or more races or ethnicities)	1%
Race or ethnicity was not disclosed	0.9%
Race or ethnicity is unknown	1.8%

What is your gender?	Chief Executives	Board Chairs
Male	25.6%	47.4%
Female	74.2%	52.5%
Non-Binary	.3%	.1%

Do you self-identify as the following?	Chief Executives	Board Chairs
Not Transgender (Cisgender)	99.3%	99.6%
Transgender	.7%	.4%

Indicate how many voting members of the board are in the following groups.	Board Members
Female	52.9%
Male	45.3%
Non-Binary	0.1%
Gender identity was not disclosed	0.9%
Gender identity is unknown	1.9%

How many voting board members self-identify as the following groups.	Board Members
Not Transgender (Cisgender)	65.3%
Transgender	0.5%
Transgender status was not disclosed	5.3%

With which of the following groups do you identify?	Chief Executives	Board Chairs
With disability	4.7%	2.8%
Without disability	89.2%	91.6%
Prefer not to answer	6.1%	5.6%

How many of the board's voting members are in the following groups?	Board Members
Without disability	62.8%
With disability	3.5%
Disability status was not disclosed	3.2%

How many of the board's voting members are in the following groups?	Board Members
Heterosexual or Straight	65%
Gay, Lesbian, Bisexual	4.1%
Other	0.1%
Sexual orientation was not disclosed	5%
Sexual orientation is unknown	25.9%

How old are you?	Chief Executives	Board Chairs
65 or older	11.4%	23.2%
55 to 64	38.0%	28.3%
45 to 54	31.0%	24.8%
35 to 44	15.8%	19.9%
25 to 34	3.7%	3.6%
Under 24	.1%	.1%

How many of the voting members are in the following age groups?	Board Members
65 or older	15.6%
55 to 64	22.8%
45 to 54	22.6%
35 to 44	19.2%
25 to 34	7.9%
Under 24	0.8%
Age is unknown	9.5%

What is your sexual orientation?	Chief Executives	Board Chairs
Gay, Lesbian, Bisexual	9.3%	5.7%
Heterosexual or Straight	89.7%	94.1%
Other	.9%	.1%

Board Diversity, Inclusion, and Equity Practices

How satisfied are you with your board's current level of diversity in each of the following areas?		Chief Executive	Board Chair
Age	Extremely dissatisfied	4.1%	1.8%
	Moderately dissatisfied	22.0%	17.6%
	Neither satisfied or dissatisfied	18.5%	12.1%
	Moderately satisfied	40.2%	44.2%
	Extremely satisfied	15.3%	24.2%
Gender	Extremely dissatisfied	4.3%	6.7%
	Moderately dissatisfied	19.7%	17.0%
	Neither satisfied or dissatisfied	15.1%	10.9%
	Moderately satisfied	33.4%	31.5%
	Extremely satisfied	27.5%	33.9%
Sexual Orientation	Extremely dissatisfied	4.1%	.6%
	Moderately dissatisfied	20.9%	13.3%
	Neither satisfied or dissatisfied	59.4%	61.2%
	Moderately satisfied	11.3%	9.7%
	Extremely satisfied	4.3%	15.2%
Race or ethnic diversity	Extremely dissatisfied	22.0%	10.9%
	Moderately dissatisfied	44.3%	36.4%
	Neither satisfied or dissatisfied	11.5%	15.8%
	Moderately satisfied	17.7%	28.5%
	Extremely satisfied	4.6%	8.5%
Disability status	Extremely dissatisfied	4.1%	1.2%
	Moderately dissatisfied	26.3%	17.0%
	Neither satisfied or dissatisfied	60.8%	67.9%
	Moderately satisfied	5.3%	9.7%
	Extremely satisfied	3.5%	4.2%
Socio-economic status	Extremely dissatisfied	4.9%	3.6%
	Moderately dissatisfied	25.0%	23.0%
	Neither satisfied or dissatisfied	40.9%	27.9%
	Moderately satisfied	24.3%	35.8%
	Extremely satisfied	4.9%	9.7%

How important do you think board diversity is to the board's overall ability to provide strategic leadership and governance to your organization...							
...within the boardroom?		Chief Executive	Board Chair	...as external ambassadors for your mission?		Chief Executive	Board Chair
Age	Not at all important	5.3%	3.6%	Age	Not at all important	3.4%	1.8%
	Somewhat important	24.0%	33.9%		Somewhat important	31.5%	36.4%
	Important	41.7%	35.8%		Important	41.7%	38.8%
	Very important	29.0%	26.7%		Very important	23.5%	23.0%
Gender	Not at all important	10.5%	9.7%	Gender	Not at all important	5.2%	5.5%
	Somewhat important	22.3%	23.6%		Somewhat important	20.9%	25.5%
	Important	35.9%	38.2%		Important	39.5%	38.8%
	Very important	31.3%	28.5%		Very important	34.4%	30.3%
Sexual Orientation	Not at all important	31.3%	35.2%	Sexual Orientation	Not at all important	33.1%	40.0%
	Somewhat important	37.9%	39.4%		Somewhat important	38.5%	38.2%
	Important	21.7%	18.8%		Important	20.8%	15.8%
	Very important	9.2%	6.7%		Very important	7.6%	6.1%
Race or ethnic diversity	Not at all important	4.4%	6.1%	Race or ethnic diversity	Not at all important	4.3%	4.8%
	Somewhat important	13.9%	19.4%		Somewhat important	13.9%	19.4%
	Important	29.5%	30.3%		Important	29.3%	32.7%
	Very important	52.2%	44.2%		Very important	52.5%	43.0%
Disability status	Not at all important	27.9%	34.5%	Disability status	Not at all important	26.0%	36.4%
	Somewhat important	40.2%	42.4%		Somewhat important	44.6%	41.2%
	Important	22.3%	13.9%		Important	20.9%	14.5%
	Very important	9.6%	9.1%		Very important	8.5%	7.9%
Socio-economic status	Not at all important	10.8%	10.9%	Socio-economic status	Not at all important	7.9%	8.5%
	Somewhat important	29.8%	29.7%		Somewhat important	33.0%	33.9%
	Important	34.4%	30.9%		Important	37.3%	29.7%
	Very important	25.0%	28.5%		Very important	21.8%	27.9%

How does the board's current level of diversity impact your organization's ability to do the following?		Chief Executive	Board Chair
Attract and retain top talent for the Board	Very negatively	4.1%	1.9%
	Somewhat negatively	29.0%	20.4%
	No impact either way	26.1%	23.5%
	Somewhat positively	24.0%	31.5%
	Very positively	15.4%	22.2%
	No opinion	1.4%	.6%
Attract and retain top talent for the staff	Very negatively	1.1%	0.0%
	Somewhat negatively	12.9%	7.4%
	No impact either way	58.5%	48.8%
	Somewhat positively	14.8%	23.5%
	Very positively	8.6%	16.0%
	No opinion	4.1%	4.3%
Understand the organization's operating environment	Very negatively	3.4%	0.0%
	Somewhat negatively	22.8%	19.8%
	No impact either way	29.2%	32.1%
	Somewhat positively	27.8%	27.8%
	Very positively	15.8%	20.4%
	No opinion	1.1%	0.0%

How does the board's current level of diversity impact your organization's ability to do the following? (Continued)		Chief Executive	Board Chair
Understand the organization's work	Very negatively	2.7%	0.0%
	Somewhat negatively	20.0%	13.6%
	No impact either way	32.3%	33.3%
	Somewhat positively	24.6%	28.4%
	Very positively	19.0%	24.7%
	No opinion	1.4%	0%
Plan effectively	Very negatively	2.3%	0.0%
	Somewhat negatively	20.5%	13.5%
	No impact either way	33.4%	38.0%
	Somewhat positively	25.6%	22.7%
	Very positively	16.9%	25.2%
	No opinion	1.3%	.6%
Strengthen programs and services	Very negatively	1.6%	0.0%
	Somewhat negatively	26.1%	19.1%
	No impact either way	31.8%	26.5%
	Somewhat positively	25.1%	28.4%
	Very positively	13.9%	24.7%
	No opinion	1.6%	1.2%
Expand donor networks	Very negatively	6.2%	1.9%
	Somewhat negatively	32.3%	30.9%
	No impact either way	20.7%	24.7%
	Somewhat positively	25.0%	22.8%
	Very positively	13.1%	18.5%
	No opinion	2.7%	1.2%
Enhance the organization's standing with funders and donors	Very negatively	3.6%	1.8%
	Somewhat negatively	28.9%	17.2%
	No impact either way	24.5%	27.6%
	Somewhat positively	24.5%	27.0%
	Very positively	16.5%	24.5%
	No opinion	2.0%	1.8%
Enhance the organization's standing with the general public	Very negatively	1.9%	0.0%
	Somewhat negatively	26.7%	16.0%
	No impact either way	25.2%	30.1%
	Somewhat positively	27.7%	30.7%
	Very positively	17.8%	22.7%
	No opinion	.8%	.6%
Understand how to best serve the community	Very negatively	4.8%	3.1%
	Somewhat negatively	35.9%	34.4%
	No impact either way	14.0%	11.7%
	Somewhat positively	28.9%	27.6%
	Very positively	15.8%	23.3%
	No opinion	.6%	0%
Cultivate trust and confidence with the community served	Very negatively	3.3%	0.0%
	Somewhat negatively	26.7%	24.1%
	No impact either way	22.0%	21.0%
	Somewhat positively	27.9%	28.4%
	Very positively	18.7%	26.5%
	No opinion	1.4%	0.0%

To what extent has the board done the following?		Chief Executive	Board Chair
Aligned Board recruitment practices with diversity goals and priorities	Not at all	20.3%	18.9%
	Small extent	25.4%	19.5%
	Some extent	33.4%	36.5%
	Great extent	18.3%	23.3%
	This is not relevant to our work	2.5%	1.9%
Demonstrated a commitment to being inclusive in Board leadership opportunities	Not at all	8.5%	10.0%
	Small extent	16.6%	10.6%
	Some extent	39.2%	28.8%
	Great extent	34.3%	48.1%
	This is not relevant to our work	1.3%	2.5%
Created a culture that supports open robust discussions	Not at all	5.4%	4.4%
	Small extent	13.1%	6.9%
	Some extent	31.3%	28.8%
	Great extent	49.7%	59.4%
	This is not relevant to our work	.5%	.6%
Created a culture that ensures all voices are heard	Not at all	5.4%	2.5%
	Small extent	16.3%	10.6%
	Some extent	36.5%	28.1%
	Great extent	40.3%	58.1%
	This is not relevant to our work	1.4%	.6%
Committed to understanding the diversity of the community the organization serves	Not at all	10.0%	6.3%
	Small extent	22.3%	13.8%
	Some extent	36.9%	40.6%
	Great extent	28.5%	35.6%
	This is not relevant to our work	2.2%	3.8%
Committed to raising its awareness and understanding of the relevance of racial inequity to the organization's mission	Not at all	28.5%	25.2%
	Small extent	24.3%	21.4%
	Some extent	27.0%	22.0%
	Great extent	14.0%	22.0%
	This is not relevant to our work	6.2%	9.4%
Discussed community needs in a way that acknowledges any disparities between different demographic groups among the people it serves	Not at all	15.8%	11.9%
	Small extent	20.3%	17.6%
	Some extent	33.5%	31.4%
	Great extent	26.6%	35.2%
	This is not relevant to our work	3.8%	3.8%
Incorporated diversity, inclusion, and equity as a lens in the organization's policies and operations	Not at all	26.5%	17.6%
	Small extent	25.9%	21.4%
	Some extent	26.1%	30.2%
	Great extent	18.8%	27.0%
	This is not relevant to our work	2.7%	3.8%
Discussed the organization's programmatic results and outcomes in a way that would surface meaningful variances based on demographics	Not at all	29.6%	23.1%
	Small extent	22.6%	17.5%
	Some extent	25.0%	29.4%
	Great extent	16.5%	21.3%
	This is not relevant to our work	6.3%	8.8%
Committed to addressing any gaps in organizational outcomes based on demographic categories	Not at all	31.1%	27.2%
	Small extent	20.5%	17.1%
	Some extent	25.7%	26.6%
	Great extent	15.0%	20.3%
	This is not relevant to our work	7.7%	8.9%

In the past three years, has your board done any of the following?	Chief Executive	Board Chair
Reviewed the board's demographic makeup as it compares to the demographic makeup of the community served.	62.5%	56.9%
Articulated why the board's diversity is important or relevant to your organization's mission, strategy, and work.	54.1%	60.0%
Established diversity goals or priorities as it relates to your organization's ideal board composition.	30.2%	33.1%
Formalized an organization-wide commitment to diversity, inclusion, and equity through a board-approved or -endorsed written statement.	19.1%	19.4%
Formalized an organization-wide commitment to diversity, inclusion, and equity through a board-approved or -endorsed policy.	18.5%	18.8%
Formalized an organization-wide commitment to diversity, inclusion, and equity through board-approved or -endorsed organizational values.	24.7%	26.9%
Examined how structural racism impacts the communities we serve.	14.8%	22.5%
Examined how structural racism may be a barrier that impedes our ability to reach the community we serve.	13.5%	18.8%
None of the above.	24.4%	21.3%

Board Recruitment

How are board members typically selected?	Chief Executive
Elected by the current board members	82.5%
Elected by your organization's members, chapters, House of Delegates, etc.	5.7%
Appointed or ex officio members with voting rights	.8%
Combination of elected and appointed	8.1%
Other	3.0%

How easy or difficult is it to find people to serve on your board?	Chief Executive	Board Chair
Very difficult	5.9%	7.4%
Difficult	25.8%	40.7%
Neither easy nor difficult	37.8%	34.3%
Easy	23.6%	11.1%
Very easy	5.7%	4.6%
We have not recently had to find new board members	1.2%	1.9%

Why is it difficult to find people to serve on the board?	Chief Executive	Board Chair
Time commitment required to participate in board-related activities	48.8%	61.5%
Limited "supply" of individuals interested in serving on boards	56.6%	55.8%
Finding individuals with the desired skill set	57.4%	75.0%
Finding individuals with the desired content expertise	37.2%	46.2%
Finding individuals with fundraising experience	52.7%	61.5%
Finding individuals with community connections	55.8%	55.8%
Other	24.8%	13.5%
None of the above	1.6%	1.9%

What importance does the board assign to the following items when recruiting board members?		Chief Executive	Board Chair
Passion for the mission	Not a priority	0.5%	0.0%
	Low priority	1.8%	1.9%
	Medium priority	17.8%	12.0%
	High priority	80.0%	86.1%
Desired skills or professional occupation (e.g., accountant, lawyer, physician, banker, etc.)	Not a priority	2.6%	.6%
	Low priority	7.5%	7.0%
	Medium priority	36.1%	32.3%
	High priority	53.8%	60.1%
Demographic characteristics (e.g., race/ethnicity, gender, age, etc.)	Not a priority	8.5%	5.7%
	Low priority	21.9%	20.9%
	Medium priority	43.6%	43.0%
	High priority	26.0%	30.4%
Knowledge of organization's work or field	Not a priority	3.8%	1.3%
	Low priority	18.1%	16.5%
	Medium priority	53.1%	51.9%
	High priority	25.0%	30.4%
Reputation and/or networks within the community	Not a priority	2.7%	4.4%
	Low priority	8.8%	6.3%
	Medium priority	39.6%	49.4%
	High priority	48.9%	39.9%
Knowledge of the community served	Not a priority	4.8%	3.2%
	Low priority	16.7%	12.0%
	Medium priority	46.1%	49.4%
	High priority	32.4%	35.4%
Membership within the community served	Not a priority	11.9%	14.6%
	Low priority	23.9%	22.2%
	Medium priority	36.4%	36.1%
	High priority	27.9%	27.2%
Reputation and/or networks with elected officials and/or other key decision makers	Not a priority	14.4%	20.9%
	Low priority	30.7%	32.9%
	Medium priority	38.4%	30.4%
	High priority	16.5%	15.8%
Ability to contribute financially to the organization	Not a priority	12.7%	8.9%
	Low priority	24.0%	30.4%
	Medium priority	36.9%	40.5%
	High priority	26.4%	20.3%
Access to a network of potential donors	Not a priority	10.1%	6.3%
	Low priority	19.2%	20.9%
	Medium priority	39.4%	49.4%
	High priority	31.4%	23.4%
Prior involvement with the organization	Not a priority	15.5%	16.5%
	Low priority	31.6%	31.6%
	Medium priority	36.2%	35.4%
	High priority	16.7%	16.5%
Prior or current experience with a similar organization or mission area	Not a priority	14.7%	10.8%
	Low priority	38.9%	33.5%
	Medium priority	35.8%	44.3%
	High priority	10.6%	11.4%

Why is it difficult to find people to serve on the board?	Chief Executive	Board Chair
Time commitment required to participate in board-related activities	48.8%	61.5%
Limited "supply" of individuals interested in serving on boards	56.6%	55.8%
Finding individuals with the desired skill set	57.4%	75.0%
Finding individuals with the desired content expertise	37.2%	46.2%
Finding individuals with fundraising experience	52.7%	61.5%
Finding individuals with community connections	55.8%	55.8%
Other	24.8%	13.5%
None of the above	1.6%	1.9%

Has your organization formally identified the desired mix of diversity, skills, and connections you expect to be represented on your board (i.e., desired board composition)?	Chief Executive	Board Chair
Yes	60.2%	61.3%
No	39.8%	38.7%

Do you compare current board composition to desired board composition as a starting point for identifying board recruitment priorities?	Chief Executive	Board Chair
Yes	91.6%	93.5%
No	8.4%	6.5%

Which of the following methods do you use to identify potential new board members? Please select ALL that apply.	Chief Executive	Board Chair
Board members' personal or professional networks	95.7%	98.1%
CEO or ED's personal or professional networks	87.7%	82.4%
Donors or representatives from institutions that fund your organization's work	52.7%	55.3%
Referrals from donors or funders	45.1%	50.3%
Leaders from the communities served by your organization's work	66.6%	59.7%
Referrals from leaders in the communities served by your organization's work	56.2%	50.3%
Program participants or former participants	45.1%	50.9%
Leaders from peer or partner organizations	42.1%	44.0%
An external professional headhunter, recruiting agency, or board matching service	4.9%	5.0%
Publicly posted or advertised board openings, i.e., newsletters, websites, social media	22.2%	19.5%
Other	7.4%	6.9%
None of the above	.6%	.6%

Board Member Onboarding Process

Does the board have an orientation process for new board members?	Chief Executive
Yes	85.3%
No	14.7%

Which of the following elements are included as part of the new board member orientation process?	Chief Executive
Overview of the board's roles and responsibilities, including the unique role of the board and staff	96.3%
Sharing of expectations for how the board works together	76.7%
Sharing of expectations for the board's overall culture and norms	59.9%
Reviewing organization's current strategic plan or priorities	90.8%
Overview of your organization's business model	68.6%
Overview of your organization's financial position	90.2%
Overview of how to understand its financial reports/statements	56.5%
Overview of your organization's commitment to diversity, inclusion, and equity	31.4%
Reviewing the conflict of interest policy	88.8%
Disclosing any potential conflicts	74.1%
Peer-to-peer mentor or board buddy	32.0%
Overview of the board's culture as it relates to diversity, inclusion, and equity	19.6%
Other	10.1%

Board Performance

Essential Board Roles					
Chief Executive Responses	How important is this performance area in terms of your expectations for the board?		How would you characterize the amount of time the board spends on the following areas?		How would you "grade" the board's performance in the following areas?
Understanding your organization's mission	Not at all important	0.2%	Not enough	31.2%	F=Failing 0.2%
	Somewhat important	3.2%	Just right	67.5%	D=Below average 2.1%
	Important	19.3%	Too much	0.6%	C=Average 14.1%
	Very important	77.3%	No time spent	0.6%	B=Above average 38.7%
					A=Excellent 45.0%
Understanding the board's roles and responsibilities	Not at all important	0.0%	Not enough	52.8%	F=Failing 2.9%
	Somewhat important	3.1%	Just right	44.5%	D=Below average 10.8%
	Important	24.6%	Too much	0.3%	C=Average 33.5%
	Very important	72.3%	No time spent	2.4%	B=Above average 38.3%
					A=Excellent 14.4%
Legal and ethical oversight	Not at all important	0.3%	Not enough	26.4%	F=Failing 1.8%
	Somewhat important	9.1%	Just right	70.4%	D=Below average 7.0%
	Important	32.0%	Too much	1.5%	C=Average 28.3%
	Very important	58.6%	No time spent	1.8%	B=Above average 33.3%
					A=Excellent 29.6%
Financial oversight	Not at all important	0.0%	Not enough	24.1%	F=Failing 2.4%
	Somewhat important	2.3%	Just right	66.7%	D=Below average 7.0%
	Important	24.8%	Too much	8.4%	C=Average 18.0%
	Very important	73.0%	No time spent	0.8%	B=Above average 34.8%
					A=Excellent 37.9%
Evaluating the chief executive's performance against goals	Not at all important	0.6%	Not enough	44.0%	F=Failing 7.0%
	Somewhat important	14.9%	Just right	46.3%	D=Below average 18.8%
	Important	45.6%	Too much	2.3%	C=Average 32.0%
	Very important	38.8%	No time spent	7.4%	B=Above average 30.4%
					A=Excellent 11.8%

Essential Board Roles

Board Chair Responses	How important is this performance area in terms of your expectations for the board?		How would you "grade" the board's performance in the following areas?		How would you "grade" the board's performance in the following areas?	
Understanding your organization's mission	Not at all important	0.0%	Not enough	20.5%	F=Failing	0.0%
	Somewhat important	1.8%	Just right	75.9%	D=Below average	0.9%
	Important	16.1%	Too much	1.8%	C=Average	17.0%
	Very important	82.1%	No time spent	1.8%	B=Above average	22.3%
					A=Excellent	59.8%
Understanding the board's roles and responsibilities	Not at all important	0.0%	Not enough	46.4%	F=Failing	3.6%
	Somewhat important	3.6%	Just right	50.9%	D=Below average	5.4%
	Important	33.9%	Too much	1.8%	C=Average	39.3%
	Very important	62.5%	No time spent	0.9%	B=Above average	30.4%
					A=Excellent	21.4%
Legal and ethical oversight	Not at all important	0.0%	Not enough	29.5%	F=Failing	0.9%
	Somewhat important	8.0%	Just right	66.1%	D=Below average	3.6%
	Important	34.8%	Too much	1.8%	C=Average	25.9%
	Very important	57.1%	No time spent	2.7%	B=Above average	38.4%
					A=Excellent	31.3%
Financial oversight	Not at all important	0.0%	Not enough	32.1%	F=Failing	2.7%
	Somewhat important	3.6%	Just right	66.1%	D=Below average	9.8%
	Important	21.4%	Too much	1.8%	C=Average	23.2%
	Very important	75.0%	No time spent	0.0%	B=Above average	32.1%
					A=Excellent	32.1%
Evaluating the chief executive's performance against goals	Not at all important	2.7%	Not enough	45.5%	F=Failing	7.1%
	Somewhat important	11.6%	Just right	48.2%	D=Below average	15.2%
	Important	41.1%	Too much	0.0%	C=Average	29.5%
	Very important	44.6%	No time spent	6.3%	B=Above average	27.7%
					A=Excellent	20.5%

Board Performance

Engagement and Leadership					
Chief Executive Responses	How important is this performance area in terms of your expectations for the board?		How would you characterize the amount of time the board spends on the following areas?		How would you "grade" the board's performance in the following areas?
Level of commitment and involvement	Not at all important	.3%	Not enough	44.2%	F=Failing 1.5%
	Somewhat important	2.7%	Just right	53.4%	D=Below average 9.1%
	Important	30.5%	Too much	1.7%	C=Average 33.6%
	Very important	66.4%	No time spent	.7%	B=Above average 39.6%
					A=Excellent 16.3%
Building a diverse and inclusive board with a commitment to equity	Not at all important	1.5%	Not enough	61.6%	F=Failing 8.2%
	Somewhat important	18.3%	Just right	28.4%	D=Below average 32.9%
	Important	39.0%	Too much	.5%	C=Average 36.5%
	Very important	41.1%	No time spent	9.4%	B=Above average 17.1%
					A=Excellent 5.3%
Fundraising	Not at all important	3.1%	Not enough	76.4%	F=Failing 12.5%
	Somewhat important	6.8%	Just right	16.3%	D=Below average 34.9%
	Important	19.9%	Too much	.9%	C=Average 33.0%
	Very important	70.2%	No time spent	6.5%	B=Above average 15.1%
					A=Excellent 4.5%
Building relationships within the community that help support and inform the organization's work (separate from fundraising)	Not at all important	1.5%	Not enough	67.5%	F=Failing 3.6%
	Somewhat important	12.0%	Just right	28.9%	D=Below average 27.1%
	Important	37.7%	Too much	.3%	C=Average 38.7%
	Very important	48.8%	No time spent	3.3%	B=Above average 23.8%
					A=Excellent 6.8%
Leveraging board connections and networks to influence public policy decisions that have the potential to impact your organization's work	Not at all important	11.0%	Not enough	53.4%	F=Failing 7.9%
	Somewhat important	29.1%	Just right	30.1%	D=Below average 38.5%
	Important	33.2%	Too much	.3%	C=Average 40.2%
	Very important	26.7%	No time spent	16.1%	B=Above average 11.3%
					A=Excellent 2.1%
Projecting a positive public image of the organization	Not at all important	.2%	Not enough	40.4%	F=Failing 1.0%
	Somewhat important	4.1%	Just right	58.0%	D=Below average 5.8%
	Important	32.2%	Too much	.2%	C=Average 25.0%
	Very important	63.5%	No time spent	1.4%	B=Above average 34.4%
					A=Excellent 33.7%

Engagement and Leadership

Board Chair Responses	How important is this performance area in terms of your expectations for the board?		How would you characterize the amount of time the board spends on the following areas?		How would you "grade" the board's performance in the following areas?	
Level of commitment and involvement	Not at all important	0%	Not enough	46.4%	F=Failing	1.3%
	Somewhat important	2.0%	Just right	52.9%	D=Below average	11.1%
	Important	30.1%	Too much	.7%	C=Average	30.1%
	Very important	68.0%	No time spent	0%	B=Above average	35.3%
					A=Excellent	22.2%
Building a diverse and inclusive board with a commitment to equity	Not at all important	1.3%	Not enough	54.9%	F=Failing	.7%
	Somewhat important	20.9%	Just right	38.6%	D=Below average	19.6%
	Important	40.5%	Too much	.7%	C=Average	42.5%
	Very important	37.3%	No time spent	5.9%	B=Above average	30.7%
					A=Excellent	6.5%
Fundraising	Not at all important	5.2%	Not enough	65.4%	F=Failing	5.2%
	Somewhat important	9.8%	Just right	28.1%	D=Below average	41.2%
	Important	26.1%	Too much	3.3%	C=Average	32.0%
	Very important	58.8%	No time spent	3.3%	B=Above average	15.0%
					A=Excellent	6.5%
Building relationships within the community that help support and inform the organization's work (separate from fundraising)	Not at all important	.7%	Not enough	55.6%	F=Failing	2.0%
	Somewhat important	9.2%	Just right	41.8%	D=Below average	21.6%
	Important	45.1%	Too much	0%	C=Average	37.9%
	Very important	45.1%	No time spent	2.6%	B=Above average	30.1%
					A=Excellent	8.5%
Leveraging board connections and networks to influence public policy decisions that have the potential to impact your organization's work	Not at all important	13.7%	Not enough	43.8%	F=Failing	5.2%
	Somewhat important	28.1%	Just right	39.9%	D=Below average	35.9%
	Important	33.3%	Too much	0%	C=Average	38.6%
	Very important	24.8%	No time spent	16.3%	B=Above average	13.7%
					A=Excellent	6.5%
Projecting a positive public image of the organization	Not at all important	0%	Not enough	33.3%	F=Failing	0%
	Somewhat important	5.2%	Just right	66.0%	D=Below average	5.2%
	Important	27.5%	Too much	0%	C=Average	19.6%
	Very important	67.3%	No time spent	.7%	B=Above average	40.5%
					A=Excellent	34.6%

Board Performance

Programs and Strategy					
Chief Executive Responses	How important is this performance area in terms of your expectations for the board?		How would you characterize the amount of time the board spends on the following areas?		How would you "grade" the board's performance in the following areas?
Knowledge of your organization's programs	Not at all important	.2%	Not enough	41.0%	F=Failing .7%
	Somewhat important	10.8%	Just right	56.6%	D=Below average 7.9%
	Important	46.9%	Too much	1.8%	C=Average 37.0%
	Very important	42.2%	No time spent	.5%	B=Above average 38.7%
					A=Excellent 15.8%
Thinking strategically as a board	Not at all important	.3%	Not enough	58.8%	F=Failing 4.5%
	Somewhat important	3.4%	Just right	36.8%	D=Below average 17.3%
	Important	28.1%	Too much	.8%	C=Average 33.6%
	Very important	68.2%	No time spent	3.5%	B=Above average 34.5%
					A=Excellent 10.1%
Setting your organization's strategic direction (in partnership with the chief executive)	Not at all important	.3%	Not enough	48.4%	F=Failing 5.2%
	Somewhat important	5.7%	Just right	47.6%	D=Below average 13.4%
	Important	28.1%	Too much	.3%	C=Average 32.4%
	Very important	65.9%	No time spent	3.7%	B=Above average 31.9%
					A=Excellent 17.0%
Monitoring impact in the context of the strategic goals or objectives	Not at all important	.3%	Not enough	53.3%	F=Failing 5.0%
	Somewhat important	12.8%	Just right	39.5%	D=Below average 20.7%
	Important	50.4%	Too much	1.0%	C=Average 40.3%
	Very important	36.5%	No time spent	6.2%	B=Above average 25.4%
					A=Excellent 8.6%
Understanding the context (funding landscape, public policy environment, other organizational players, etc.) in which your organization is working	Not at all important	1.0%	Not enough	55.6%	F=Failing 3.5%
	Somewhat important	15.8%	Just right	38.8%	D=Below average 18.8%
	Important	48.1%	Too much	.3%	C=Average 42.9%
	Very important	35.1%	No time spent	5.2%	B=Above average 27.7%
					A=Excellent 7.1%
Monitoring legislative and regulatory issues that have the potential to impact your organization (positively or negatively)	Not at all important	12.8%	Not enough	40.5%	F=Failing 8.6%
	Somewhat important	44.9%	Just right	40.5%	D=Below average 39.0%
	Important	31.1%	Too much	.5%	C=Average 36.5%
	Very important	11.3%	No time spent	18.5%	B=Above average 11.1%
					A=Excellent 4.9%
Providing guidance to the chief executive	Not at all important	1.0%	Not enough	28.6%	F=Failing 3.7%
	Somewhat important	15.6%	Just right	66.1%	D=Below average 9.9%
	Important	48.4%	Too much	2.4%	C=Average 35.6%
	Very important	35.0%	No time spent	3.0%	B=Above average 34.1%
					A=Excellent 16.6%

Programs and Strategy

Board Chair Responses	How important is this performance area in terms of your expectations for the board?		How would you characterize the amount of time the board spends on the following areas?		How would you "grade" the board's performance in the following areas?	
Knowledge of your organization's programs	Not at all important	.7%	Not enough	24.2%	F=Failing	.7%
	Somewhat important	4.6%	Just right	73.2%	D=Below average	3.9%
	Important	47.7%	Too much	2.6%	C=Average	27.5%
	Very important	47.1%	No time spent	0%	B=Above average	39.9%
					A=Excellent	28.1%
Thinking strategically as a board	Not at all important	0%	Not enough	58.8%	F=Failing	2.0%
	Somewhat important	4.6%	Just right	39.9%	D=Below average	17.0%
	Important	28.1%	Too much	0%	C=Average	32.0%
	Very important	67.3%	No time spent	1.3%	B=Above average	31.4%
					A=Excellent	17.6%
Setting your organization's strategic direction (in partnership with the chief executive)	Not at all important	.7%	Not enough	48.4%	F=Failing	2.6%
	Somewhat important	2.6%	Just right	49.0%	D=Below average	10.5%
	Important	28.8%	Too much	1.3%	C=Average	34.0%
	Very important	68.0%	No time spent	1.3%	B=Above average	28.1%
					A=Excellent	24.8%
Monitoring impact in the context of the strategic goals or objectives	Not at all important	.7%	Not enough	48.4%	F=Failing	2.0%
	Somewhat important	7.2%	Just right	50.3%	D=Below average	15.7%
	Important	47.1%	Too much	0%	C=Average	36.6%
	Very important	45.1%	No time spent	1.3%	B=Above average	30.1%
					A=Excellent	15.7%
Understanding the context (funding landscape, public policy environment, other organizational players, etc.) in which your organization is working	Not at all important	0.0%	Not enough	51.6%	F=Failing	1.3%
	Somewhat important	15.0%	Just right	45.1%	D=Below average	14.4%
	Important	46.4%	Too much	.7%	C=Average	35.3%
	Very important	38.6%	No time spent	2.6%	B=Above average	34.0%
					A=Excellent	15.0%
Monitoring legislative and regulatory issues that have the potential to impact your organization (positively or negatively)	Not at all important	6.5%	Not enough	35.9%	F=Failing	3.3%
	Somewhat important	43.1%	Just right	49.7%	D=Below average	29.4%
	Important	30.7%	Too much	.7%	C=Average	38.6%
	Very important	19.6%	No time spent	13.7%	B=Above average	16.3%
					A=Excellent	12.4%
Providing guidance to the chief executive	Not at all important	1.3%	Not enough	22.9%	F=Failing	1.3%
	Somewhat important	14.4%	Just right	69.3%	D=Below average	9.8%
	Important	45.1%	Too much	5.2%	C=Average	30.7%
	Very important	39.2%	No time spent	2.6%	B=Above average	41.2%
					A=Excellent	17.0%

Board Self-Assessment

How recently has your board conducted a formal written self-assessment to evaluate its own performance?	Chief Executive	Board Chair
During the past 12 months	32.3%	30.4%
More than 1 year ago but less than 2 years ago	14.7%	14.1%
More than 2 years ago but less than 3 years ago	7.6%	5.2%
3 or more years ago	12.5%	8.1%
No self-assessment has been done	32.9%	42.2%

How did you use the results of the board's self-assessment?	Chief Executive	Board Chair
To set priorities for board performance	58.2%	68.8%
To develop a board action plan	50.7%	51.9%
To get deeper understanding on a sensitive area of board performance	42.3%	46.8%
In tandem with a strategic planning process	42.3%	41.6%
In preparation for an executive's departure	5.0%	0.0%
To gauge board readiness to address change	19.2%	14.3%
None of the above	15.3%	10.4%

To what extent do you agree with the following statements?		Chief Executive	Board Chair
There is a clear linkage between board priorities and organizational goals	Strongly disagree	3.5%	0.0%
	Disagree	12.0%	1.3%
	Neither agree nor disagree	14.0%	8.7%
	Agree	39.4%	32.9%
	Strongly agree	31.1%	57.0%
Board members appropriately balance short-term and long-term needs	Strongly disagree	3.9%	0.0%
	Disagree	15.7%	12.7%
	Neither agree nor disagree	21.3%	13.3%
	Agree	44.2%	44.0%
	Strongly agree	15.0%	30.0%
The board is adaptable in the face of changes in the environment, funding levels, etc., in order to sustain organization's mission	Strongly disagree	3.7%	0.0%
	Disagree	12.2%	6.8%
	Neither agree nor disagree	15.5%	14.4%
	Agree	44.0%	41.1%
	Strongly agree	24.6%	37.7%
When making decisions, the board prioritizes the needs and voice of the community served by your organization	Strongly disagree	3.3%	.7%
	Disagree	11.4%	4.0%
	Neither agree nor disagree	25.5%	15.4%
	Agree	36.4%	40.9%
	Strongly agree	23.2%	38.9%

Fundraising

Does your organization raise funds to fully or partially support its work?	Chief Executive	Board Chair
Yes	94.4%	95.4%
No	5.6%	4.6%

Does the board require its members to make a personal monetary contribution to your organization? (only organizations that fundraise)	Chief Executive	Board Chair
Yes, board members are required to make a personal contribution, and we specify a minimum or an exact amount	18.6%	25.5%
Yes, board members are required to make a personal contribution, but we do not specify a minimum or exact amount	67.8%	53.9%
No	13.7%	20.6%

In the last fiscal year, what was the amount each board member was required to personally contribute? (only organizations that fundraise and specify a minimum or exact amount)	Chief Executive	Board Chair
Mean	\$2,803.18	\$3,233.97

To what extent do board members do the following? (only organizations that fundraise)	Chief Executive	Board Chair
Receive information during recruitment regarding expectations of their role in fundraising	Not at all	4.9%
	Small extent	12.5%
	Some extent	44.4%
	Great extent	38.2%
Understand your organization's revenue mix, (e.g., govt. funding, charitable gifts, fees for service)	Not at all	.7%
	Small extent	11.7%
	Some extent	32.4%
	Great extent	55.2%
Hold each other accountable for fulfilling their fundraising responsibilities	Not at all	29.0%
	Small extent	35.2%
	Some extent	26.9%
	Great extent	9.0%
Work in partnership with staff to introduce new donors and funders to your organization	Not at all	6.9%
	Small extent	42.1%
	Some extent	35.9%
	Great extent	15.2%
Ensure that your organization is investing in fundraising to support long-term resilience	Not at all	9.0%
	Small extent	29.7%
	Some extent	37.2%
	Great extent	24.1%

Advocacy/Public Policy

Have you encountered any of the following barriers when talking with the board about advocacy?	Chief Executive	Board Chair
The board was resistant to advocacy and public policy efforts	9.1%	4.7%
The board did not understand that advocacy is legal	8.4%	5.4%
The board thought that advocacy means getting involved in politics	11.6%	10.1%
The board did not see how advocacy and public policy are important to the organization's mission	11.3%	10.7%
The board wanted to focus on other things, like fundraising	10.0%	12.8%
The board did not understand their role in advocacy	20.7%	26.2%
The board did not understand their role in ambassadorship	12.1%	16.8%
The board has not discussed advocacy	36.1%	39.6%
None of the above	30.2%	36.2%

To what extent do board members do the following?		Chief Executive	Board Chair
Understand how public policy impacts your organization's mission	Not at all	17.0%	16.6%
	Small extent	39.5%	29.8%
	Some extent	31.1%	31.1%
	Great extent	12.4%	22.5%
Monitor the impact of local, state, and federal policies on your organization's mission	Not at all	33.4%	24.2%
	Small extent	35.8%	31.5%
	Some extent	24.1%	28.9%
	Great extent	6.6%	15.4%
Monitor the impact of local, state, and federal policy on your organization's resources	Not at all	32.2%	28.0%
	Small extent	37.0%	30.0%
	Some extent	24.9%	26.7%
	Great extent	6.0%	15.3%

To what extent is advocacy/public policy a part of the overall strategy of your organization?	Chief Executive	Board Chair
Not at all	26.9%	31.8%
Small extent	32.3%	29.1%
Some extent	25.8%	21.9%
Great extent	15.0%	17.2%

Does your organization take the 501(h) election?	Chief Executive	Board Chair
Yes	10.8%	11.1%
No	89.2%	88.9%

Does your organization receive public funding (for example, government grants)?	Chief Executive	Board Chair
Yes	65.3%	53.4%
No	34.7%	46.6%

To what extent do board members do the following?		Chief Executive	Board Chair
Allocate resources toward advocacy aligned with your organization's strategic goals	Not at all	42.4%	34.3%
	Small extent	30.5%	26.5%
	Some extent	20.1%	23.5%
	Great extent	7.0%	15.7%
Connect the organization with community leaders and potential coalition partners	Not at all	14.4%	5.8%
	Small extent	43.4%	41.7%
	Some extent	34.3%	30.1%
	Great extent	7.9%	22.3%
Work in concert with the chief executive and leadership team to educate policymakers on behalf of your organization	Not at all	34.8%	23.3%
	Small extent	37.4%	34.0%
	Some extent	22.5%	21.4%
	Great extent	5.3%	21.4%
Work in concert with the chief executive and leadership team to educate policymakers on behalf of the nonprofit sector	Not at all	50.6%	30.4%
	Small extent	32.1%	38.2%
	Some extent	13.9%	17.6%
	Great extent	3.4%	13.7%

Partnerships

How would you describe the board's current attitude toward back-office consolidation/ shared services or structured long-term legally binding collaborations (joint ventures, mergers, acquisitions, asset transfers)?	Chief Executive	Board Chair
The majority of the board would not be open to this type of discussion	11.3%	22.1%
There is no clear majority in either direction	25.7%	13.0%
The majority of the board is open to considering how these might support our organizational strategy and/or sustainability	63.0%	64.9%

To what extent do you agree with the following statements?		Chief Executive	Board Chair
I am comfortable discussing back-office consolidation/shared services or structured long-term legally binding collaborations (joint ventures, mergers, acquisitions, asset transfers) with my board	Strongly disagree	4.6%	2.7%
	Disagree	4.8%	7.4%
	Neither agree nor disagree	23.7%	30.2%
	Agree	39.9%	31.5%
	Strongly agree	26.9%	28.2%
The board perceives back-office consolidation/ shared services or structured long-term legally binding collaborations (joint ventures, mergers, acquisitions, asset transfers) as a strategic option to enhance organizational efficiency and effectiveness	Strongly disagree	5.0%	9.3%
	Disagree	6.6%	5.3%
	Neither agree nor disagree	55.6%	60.0%
	Agree	21.3%	14.7%
	Strongly agree	11.5%	10.7%

Please select ALL of the following statements that apply to the board as they relate specifically to back-office consolidation/shared services or structured long-term legally binding collaborations (joint ventures, mergers, acquisitions, asset transfers):	Chief Executive	Board Chair
The board is knowledgeable about how these opportunities have been used by other nonprofit organizations to support organizational strategy and/or sustainability	22.0%	17.0%
The board has discussed how these opportunities might support our organizational strategy and/or sustainability in the past several years	30.2%	26.4%
The board has discussed specific opportunities to expand our organization's impact through a back-office consolidation/shared services or structured long-term legally binding collaboration with one or more other organization(s) in the past several years	27.0%	19.8%
The board has explored specific opportunities to expand our organization's impact through a back-office consolidation/shared services or structured long-term legally binding collaborations with one or more other organization(s) in the past several years	21.5%	17.0%
The board has established criteria for when we would seek out (or be open to) opportunities for back-office consolidation/shared services or structured long-term legally binding collaborations	4.5%	3.8%
The board has an established process for evaluating potential back-office consolidation/shared services or structured long-term legally binding collaborations	5.9%	5.7%
None of the above	55.7%	64.2%

Which, if any, of the following activities has your organization participated in at any time in the past five years?	Chief Executive	Board Chair
Joint programming with another organization	69.2%	56.5%
Back-office consolidation/shared services	17.5%	14.8%
Structured long-term legally binding collaboration (joint venture, merger, acquisition, asset transfer)	12.1%	10.2%
None	27.1%	37.0%

Board Impact

What impact does the board have on the following?		Chief Executive	Board Chair
Clearly defining strategic priorities for your organization	Very negative	.9%	.7%
	Somewhat negative	6.8%	1.3%
	Neither positive or negative	16.1%	11.9%
	Somewhat positive	40.8%	33.8%
	Very positive	35.4%	52.3%
Your organization's reputation for doing good work, within networks that are important to your mission	Very negative	.2%	0%
	Somewhat negative	1.6%	.7%
	Neither positive or negative	16.8%	9.2%
	Somewhat positive	42.8%	36.2%
	Very positive	38.6%	53.9%
The financial resourcing of your organization's work	Very negative	2.8%	0%
	Somewhat negative	11.1%	6.0%
	Neither positive or negative	23.6%	17.9%
	Somewhat positive	43.1%	43.0%
	Very positive	19.4%	33.1%
Your organization's ability to act on calculated risks to advance its goals	Very negative	1.6%	.7%
	Somewhat negative	9.6%	4.1%
	Neither positive or negative	26.1%	22.8%
	Somewhat positive	38.2%	38.6%
	Very positive	24.5%	33.8%
Your organization's overall performance	Very negative	1.6%	.7%
	Somewhat negative	4.3%	0%
	Neither positive or negative	15.5%	12.7%
	Somewhat positive	48.0%	47.3%
	Very positive	30.6%	39.3%

How does the board's overall performance now compare to its performance three years ago?		Chief Executive	Board Chair
Much more negative now		1.1%	0.0%
Somewhat more negative now		5.2%	2.9%
About the same now		16.3%	16.4%
Somewhat more positive now		34.6%	30.0%
Much more positive now		42.7%	50.7%

Where does the board fall on the spectrum for each statement? Select the number from 1-5 that most closely aligns with where your board falls between the statement on the left and the statement on the right. (Range: 1 for the statement on the left up to 5 for the statement on the right)		Chief Executive (Average)	Board Chair (Average)
The board is primarily focused on operational issues	The board is primarily focused on strategic issues	3.24	3.24
The board generally accepts strategic recommendations without discussion	The board discusses organizational strategy to surface underlying assumptions	3.35	3.58
The board is not involved in leading the strategy of your organization	The board is a partner to the CEO/ED in leading the strategy of your organization	3.63	3.99

Organization Performance

How would you rate your organization's overall effectiveness at achieving its core purpose?	Chief Executive	Board Chair
Very ineffective	5.5%	8.2%
Somewhat ineffective	3.9%	2.5%
Neither effective nor ineffective	2.7%	3.8%
Effective	38.0%	39.2%
Very effective	49.9%	46.2%

In your opinion, how would you describe your organization's financial resilience?	Chief Executive	Board Chair
Not at all resilient	6.7%	8.3%
Somewhat resilient	30.1%	26.1%
Resilient	32.7%	39.5%
Very Resilient	30.4%	26.1%

Which of the following statements are applicable to your organization?	Chief Executive	Board Chair
Our revenues are growing	70.2%	72.2%
Our net performance is improving	73.1%	70.3%
We have strong renewal rates from donors and funders	61.8%	69.6%
None of the above	8.2%	7.6%

Board Culture

In the previous 12 months, how many hours did the board spend together in social activities?	Chief Executive	Board Chair
Average	5.1	6.9

How strongly do you agree or disagree with the following statements related your board's culture?		Chief Executive	Board Chair
Our board members are committed to our work	Strongly disagree	.5%	0%
	Disagree	2.1%	1.3%
	Neither agree nor disagree	6.9%	8.0%
	Agree	31.7%	32.0%
	Strongly agree	58.8%	58.7%
Our board members share clearly articulated core values that guide decision making	Strongly disagree	2.3%	.7%
	Disagree	11.3%	5.3%
	Neither agree nor disagree	18.3%	14.7%
	Agree	42.3%	37.3%
	Strongly agree	25.8%	42.0%
The board is able to resolve internal conflicts in a professional way	Strongly disagree	3.2%	.7%
	Disagree	3.9%	3.4%
	Neither agree nor disagree	12.8%	8.8%
	Agree	44.2%	46.3%
	Strongly agree	35.9%	40.8%
Board members listen attentively and respectfully to each other	Strongly disagree	.9%	0.0%
	Disagree	3.2%	2.6%
	Neither agree nor disagree	5.8%	2.6%
	Agree	36.5%	34.4%
	Strongly agree	53.6%	60.3%
The board encourages creativity and innovation	Strongly disagree	1.4%	.7%
	Disagree	9.0%	4.6%
	Neither agree nor disagree	17.9%	14.6%
	Agree	42.9%	39.1%
	Strongly agree	28.7%	41.1%
Our board is able to work together toward a common goal	Strongly disagree	.9%	0.0%
	Disagree	2.5%	2.6%
	Neither agree nor disagree	6.4%	6.6%
	Agree	40.8%	29.1%
	Strongly agree	49.5%	61.6%
There is honest communication between board members	Strongly disagree	2.0%	2.0%
	Disagree	5.2%	3.3%
	Neither agree nor disagree	11.9%	8.6%
	Agree	45.0%	40.4%
	Strongly agree	36.0%	45.7%
Success is celebrated on the board	Strongly disagree	1.2%	.7%
	Disagree	6.5%	2.7%
	Neither agree nor disagree	9.5%	6.7%
	Agree	42.8%	41.6%
	Strongly agree	39.9%	48.3%
Board members take collective responsibility for failures and mistakes	Strongly disagree	5.0%	.7%
	Disagree	16.6%	12.5%
	Neither agree nor disagree	31.7%	25.0%
	Agree	31.2%	35.3%
	Strongly agree	15.5%	26.5%
Our board has social time that enables board members to get to know each other outside of structured board meetings	Strongly disagree	6.9%	4.7%
	Disagree	24.6%	17.6%
	Neither agree nor disagree	14.4%	15.5%
	Agree	37.2%	40.5%
	Strongly agree	16.9%	21.6%

Board Chair Performance

How would you "grade" the leadership of the current board chair in the following areas?		Chief Executive
Fosters an environment that builds trust among board members	F=Failing	1.2%
	D=Below average	3.5%
	C=Average	18.0%
	B=Above average	29.5%
	A=Excellent	47.8%
Encourages board members to frame strategic questions	F=Failing	3.1%
	D=Below average	8.1%
	C=Average	23.2%
	B=Above average	31.5%
	A=Excellent	34.0%
Ensures that there are clear expectations of board service	F=Failing	5.2%
	D=Below average	10.9%
	C=Average	26.9%
	B=Above average	32.4%
	A=Excellent	24.6%
Is able to resolve conflict, build consensus, and reach compromise to enable the board to move forward	F=Failing	3.5%
	D=Below average	5.4%
	C=Average	22.7%
	B=Above average	35.4%
	A=Excellent	33.0%
Ensures decision making is shared amongst all board members	F=Failing	2.6%
	D=Below average	6.4%
	C=Average	18.2%
	B=Above average	37.8%
	A=Excellent	34.9%
Which statements reflect the process used to select your current board chair? Please select ALL that apply.		Chief Executive
We elected a chair who was well qualified		66.5%
We elected a chair who was well respected by the rest of the board		73.6%
We elected a chair who was looking forward to serving as our chair		64.8%
We elected a chair who was well prepared		53.8%
We elected a chair who was not fully prepared to serve as our chair		12.7%
We elected a chair who was the only person willing to serve		22.2%
CEO was invited to share perspectives on how effectively partner with the individual who became chair prior to his or her election		33.3%
We did not hold a formal election for our current chair		4.9%
None of the above		1.7%
What is the maximum number of years that an individual can serve as chair?		Chief Executive
Mean		3.4

Board Policies and Practices

Does your organization or board have the following?	Chief Executive
A written vision statement	78.0%
A written mission statement	98.3%
A written statement of organizational values	62.1%
A formal strategic plan or framework for your organization	78.0%
A document retention and destruction policy	77.3%
A whistleblower policy that includes a way for employees to report issues directly to the board	84.6%
A written conflict-of-interest policy	96.1%
Written positions or job descriptions for board members	73.6%
Written charters for committees	52.3%
Written job description for the CEO/ED	87.3%
Written succession plan or policy to guide the board when CEO/ED transition occurs	28.9%
Written emergency backup plan for handling unexpected executive departures	26.9%
Written policy for board leadership succession planning	12.5%
None of the above	0%

Who is involved in developing the strategic plan for your organization? <i>(only asked of those who said that they have a formal strategic plan or framework)</i>	Chief Executive
Board chair	63.6%
Subset of the board but not the full board, i.e., executive or compensation committee	38.2%
Full board.	74.9%
Senior or direct-reporting staff	87.8%
Clients/customers/constituents/program participants	29.5%
Grantmakers	11.6%
Other	8.5%

When did the board last review or update your bylaws?	Chief Executive
Within the past 12 months	40.3%
More than 1 but less than 2 years ago	25.3%
More than 2 but less than 5 years ago	22.3%
5 or more years ago	12.2%

Does your board do the following?	Chief Executive
Require board members to sign a conflict-of-interest and annual disclosure statement	89.5%
Hire an auditor to conduct an annual external financial audit	85.1%
Meet as a full board or as a committee of the board with auditors	67.0%
Meet as a full board or as a committee of the board with auditors without staff present	30.3%
Receive a copy of the IRS Form 990 before filing	85.1%
Full board approval of the annual budget	96.6%
Full board approval of the IRS Form 990	62.3%
Full board approval of changes in the CEO/ED's compensation	74.6%
Post financial statements to your website	31.5%
Post your complete IRS Form 990 to your website	40.3%
Provide information on your organization and the board (including demographics) on GuideStar	69.2%
Require all board members to make a personal monetary contribution to your organization	76.8%
Pay board members a salary or a fee/honorarium for their service	.5%
Reimburse or provide a stipend to board members for expenses incurred in attending board meetings (e.g. travel, lodging, etc.)	12.5%
Carry directors' and officers' liability insurance	95.6%
Use consent agendas during board meetings	57.9%
None of the above.	.2%

Board Terms and Limits

How long are the terms of office for the board chair?	Chief Executive
No terms or term limits	12.5%
Terms, but no limit on the number of terms that can be served	33.5%
Terms and term limits	54.0%

How many consecutive terms can be served by board members?	Chief Executive	Board Chair
No limit on consecutive terms	23.7%	32.7%
1 term	.2%	.9%
2 terms	46.0%	33.6%
3 terms	24.4%	26.2%
4 or more but with limit	5.6%	6.5%

How long are the board member terms of office?	Chief Executive	Board Chair
No limits on term length	4.6%	9.3%
1-year term	1.7%	.9%
2-year term	18.1%	22.2%
3-year term	72.6%	65.7%
4-year term or longer	2.9%	1.9%

Board Committees

How many standing committees does your board have?	Chief Executive
Mean	4.1

Which of the following standing committees does your board presently have?	Chief Executive
Audit, Finance, or Audit/Finance combined	82.1%
Development/Fundraising	75.9%
Executive	61.4%
Governance, Nominating, or Governance/Nominating combined	70.5%
Marketing/Communications/Public Relations	18.9%
Planning/Strategy	27.8%
Program	12.5%
Other	31.0%
We have no permanent committees	4.9%

Which statement best describes the board's Executive Committee?	Chief Executive
The executive committee meets regularly	53.4%
The executive committee meets only when there is a specific issue that needs to be addressed urgently	42.7%
The executive committee has clearly defined parameters about when and how it is empowered to make decisions on behalf of the board	43.7%
Most of the decisions that are made at the board level are made by the executive committee	4.5%
None of the above	2.6%

Board Meetings

What is the average attendance by the voting members of the board at board meetings?	Chief Executive	Does your board have standing executive sessions to discuss sensitive or confidential issues?	Chief Executive	Board Chair
90% to 100%	28.4%	Yes, on every meeting agenda	25.7%	28.5%
75% to 89%	56.0%	Yes, but not on every meeting agenda	16.5%	21.2%
50% to 74%	15.4%	No, we hold executive sessions only as needed	49.1%	41.1%
Less than 50%	.2%	No, we do not have executive sessions	8.6%	9.3%

Do the executive sessions occur both with and without the CEO/ED?	Chief Executive	Board Chair
Yes, both with and without the CEO/ED	64.4%	70.6%
No, only without the CEO/ED	22.2%	17.6%
No, only with the CEO/ED	13.3%	11.8%

Typically, board members receive board meeting materials:	Chief Executive	Board Chair
The day of the board meeting	2.0%	5.6%
The day before the board meeting	5.9%	6.5%
At least 3 days before the board meeting	51.1%	56.5%
At least 1 week before the board meeting	38.4%	27.8%
At least 2 weeks before the board meeting	2.4%	3.7%
More than 2 weeks before the board meeting	.2%	0.0%

To what extent do the following occur?		Chief Executive	Board Chair
Board meeting materials provide the information that board members need to fully engage in board discussion and decision making	Not at all	.5%	0%
	Small extent	1.6%	3.3%
	Some extent	11.4%	18.5%
	Great extent	86.4%	78.1%
Meetings allow adequate time for board members to ask questions	Not at all	.5%	0%
	Small extent	3.3%	3.3%
	Some extent	24.1%	23.2%
	Great extent	72.0%	73.5%
Board members read meeting materials in advance of the meeting	Not at all	3.5%	2.0%
	Small extent	24.2%	21.9%
	Some extent	47.5%	52.3%
	Great extent	24.8%	23.8%
Board meetings focus on strategy and policy rather than operational issues	Not at all	5.5%	4.0%
	Small extent	20.5%	25.8%
	Some extent	47.2%	47.7%
	Great extent	26.9%	22.5%
Board meetings focus on the issues of greatest importance to your organization at that time	Not at all	1.2%	0%
	Small extent	7.4%	4.0%
	Some extent	28.2%	32.5%
	Great extent	63.1%	63.6%

Board Chair Experience

How many years have you served on this board in total, as either the chair or a voting member?	Board Chair
Mean	6.4
How many years have you served as the chair of this board?	Board Chair
Mean	2.5
Is this the first time you have served as a board chair?	Board Chair
Yes	62.0%
No	38.0%
On average, how many hours per month do you personally typically spend on board-related activities?	Board Chair
Mean	26.3
On average, how many hours per month do you personally typically spend on board-related activities?	Board Chair
Mean	26.3
How many years of work experience in the nonprofit sector do you have (including your current position)?	Board Chair
Mean	20.9
How many other boards do you currently serve on, apart from this one?	Board Chair
Nonprofit boards	0.9
For-profit boards	0.1
Other boards	0.2
How would you rate your board experience?	Board Chair
Extremely unrewarding	6.5%
Moderately unrewarding	4.1%
Neutral	2.9%
Moderately rewarding	25.3%
Extremely rewarding	61.2%

Executive Compensation

Does the board have a formal process for setting appropriate compensation for the CEO/ED?	Board Chair
Yes	54.9%
No	45.1%

How important to the board is each of the following factors in setting compensation for the CEO/ED?	Board Chair		
	Major factor in setting CEO/ED compensation	Minor factor in setting CEO/ED compensation	Not a factor at all in setting CEO/ED compensation
CEO/ED's personal annual performance review results	81.5%	14.1%	4.3%
Organization's performance in meeting its objectives	85.9%	9.8%	4.3%
Compensation surveys for other CEOs/EDs in this type & size of organization in this labor market	56.5%	34.8%	8.7%
Cost of living increase over previous year	26.1%	57.6%	16.3%
Staff retention rates	20.0%	53.3%	26.7%
Fundraising success	58.7%	32.6%	8.7%
Length of time in CEO/ED position	32.3%	45.2%	22.6%

Who participates in the process to set the compensation for the CEO/ED?	Board Chair
Board chair	55.8%
Subset of the board but not the full board, i.e., executive or compensation committee	73.7%
Full board	52.6%
Other	5.3%
I don't know	2.1%

Executive Perspectives

Who do you believe to be your best "go-to" person when you need to consult frankly on a tough decision? (Top 2 Group)	Chief Executive
Board chair	69.6%
Other current board member	31.4%
Former board member	7.4%
Senior staff of your organization	44.4%
Spouse or partner	14.5%
Mentor outside of my organization	28.9%
Other	2.9%
I don't have a trusted "go-to" person	.2%

Who do you believe to be your best "go-to" person when you need to consult frankly on a tough decision? (Top 2 Rank)		
Chief Executive	1	2
Board chair	67.6%	32.4%
Other current board member	34.4%	65.6%
Former board member	26.7%	73.3%
Senior staff of your organization	55.2%	44.8%
Spouse or partner	37.3%	62.7%
Mentor outside of my organization	33.1%	66.9%
Other	16.7%	83.3%
I don't have a trusted "go-to" person	100.0%	0.0%

Are you currently working for your organization with a written contract?	Chief Executive
Yes	26.9%
No	73.1%

How would you rate your personal job satisfaction?	Chief Executive
Extremely dissatisfied	5.2%
Moderately dissatisfied	7.9%
Neither satisfied nor dissatisfied	1.9%
Moderately satisfied	39.8%
Extremely satisfied	45.2%

What kind of impact does your board have on your level of personal job satisfaction?	Chief Executive
Extremely negative	2.9%
Moderately negative	16.1%
Neither positive nor negative	8.2%
Moderately positive	45.5%
Extremely positive	27.3%

What are the two factors that most significantly affect the board's impact on your job satisfaction (either positively or negatively)? (Group)	Chief Executive
The extent to which the board sees you as responsible for the success (or failures) of your organization	14.1%
The extent to which the board sees their responsibility for the success (or failures) of your organization	30.1%
The extent to which the board understands the distinct roles of the board and staff	27.4%
The extent to which the board adds value and perspective as a part of strategic conversations	42.5%
The extent to which the board allows you to lead your organization autonomously and independently	31.2%
Your working relationship with the board chair	28.4%
The amount of money that the board gives to your organization	3.4%
The amount of money that the board raises for your organization	21.8%
Other	.6%

What are the two factors that most significantly affect the board's impact on your job satisfaction (either positively or negatively)? (Rank)	1	2
The extent to which the board sees you as responsible for the success (or failures) of your organization	54.2%	45.8%
The extent to which the board sees their responsibility for the success (or failures) of your organization	54.1%	45.9%
The extent to which the board understands the distinct roles of the board and staff	51.6%	48.4%
The extent to which the board adds value and perspective as a part of strategic conversations	52.9%	47.1%
The extent to which the board allows you to lead your organization autonomously and independently	55.2%	44.8%
Your working relationship with the board chair	48.2%	51.8%
The amount of money that the board gives to your organization	34.8%	65.2%
The amount of money that the board raises for your organization	32.4%	67.6%
Other	50.0%	50.0%

The background is a deep blue with a complex, organic pattern of concentric, wavy lines that resemble ripples on water or a topographical map. Scattered throughout are numerous out-of-focus light points, creating a bokeh effect. The overall mood is serene and sophisticated.

BoardSource[®]

Empowering Boards. Inspiring Leadership.

[BOARDSOURCE.ORG](https://boardsource.org) | [LEADINGWITHINTENT.ORG](https://leadingwithintent.org)