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## Building or Evaluating Your Board

In today's rapidly evolving nonprofit landscape, building a resilient and future-ready organization starts with a strong, diverse, and strategically aligned board. This worksheet is designed to help you assess your current board composition—or plan for a new one—through the lens of financial governance, mission alignment, and inclusive leadership. Use this tool to identify gaps, clarify roles, and recruit members who can help your organization thrive through uncertainty.

### How Many Board Members?

- Consider at least 5 and up to 7 Board members at inception
- As you grow, the number of board members you have may grow too; membership positions should represent leadership over key strategic priorities

### Who Should Be on the Board?

- Leaders of the Organization—CEO/Executive Director and Your Board Chair
- Professional Partners—Audit/Tax, Grantmaking, Investment Management
- Key Strategic Advisors—leaders who are passionate about your mission

### How Will They Support the Organization?

- Think about which prospective Board member might lead in Finance and Investment, in Grant Approval, HR, Governance, etc.

### What Is Their Personal Style and Background?

- Think about how each individual would work together as part of your leadership team
- Also consider their age, background, and experience level. Combining younger board members with more seasoned leaders, and men and women of diverse backgrounds will enhance continuity in the organization and promote diversity of thought along the way

### How Long Will They Serve For?

- A timebound ask is easier to accept, while staggering terms of service promotes continuity

# Board Matrix Worksheet

Board Needs Assessment and Recruitment Tool

	Board Member #1	Board Member #2	Board Member #3	Board Member #4	Board Member #5	Board Member #6	Board Member #7
	Name	Name	Name	Name	Name	Name	Name
<b>Years on Board (If Current Board Exists)</b>							
0/New							
1 to 2							
2 to 3							
3 to 5							
5+							
<b>Organizational Affiliation (Staff/Board Referral Contact)</b>							
CEO							
Board Chair							
Other							
<b>SME/Industry</b>							
Investment Mgmt							
Financial Leader (CFO, etc.)							
Attorney							
Nonprofit Leader							
Foundation Leader							
Government Leader							
CPA/Audit							
Consultant (Industry?)							
Marketing/PR							
HR							
Real Estate							
Technology							
Other Mission-Related SME?							
Other							
<b>Ideal Partnership Purpose</b>							
Financial/Investment Oversight							
Programmatic/Mission Relevance							
Legal Support							
Accounting/Tax							
Political Connections/ Oversight							
Philanthropic/Development Oversight							
Governance/General Leadership							
CEO Support/Consulting							
Events/Marketing							
<b>Funding/Access to Funding</b>							
Funds to give (have given "meaningfully")							
Funds to give (have not given "meaningfully")							
Access to funds							
Access to other resources (foundations, corporate support)							

# Board Matrix Worksheet (Cont.)

## Board Needs Assessment and Recruitment Tool

	Board Member #1	Board Member #2	Board Member #3	Board Member #4	Board Member #5	Board Member #6	Board Member #7
	Name	Name	Name	Name	Name	Name	Name
Committee/Board Engagement (Current or Prospective)							
Executive/Leadership Committee							
Governance Committee							
Finance Committee							
Investment Committee							
Development Committee							
Other?							
Personal Style							
Consensus Builder							
Strong Communicator							
Strategist							
Team Member							
Thought Leader							
Visionary							
Age							
18–34							
35–50							
51–65							
66–75							
75+							
Gender							
Male							
Female							
Nonbinary							
Race/Ethnicity							
African American							
Asian/Pacific Islander							
Caucasian							
Hispanic or Latino							
Native American							
Native Hawaiian							
Other							

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