

Self-Assessment Tool for Free and Charitable Clinic Boards

Instructions: Each board member should complete this assessment annually. Use a scale of 1–5: 1 = All of the time, 2 = Most of the time, 3 = Sometimes, 4 = Rarely, 5 = Never

1. Board Governance & Responsibilities

Statement	Rating	Comments
I understand the mission, vision, and values of the organization.		
I understand the legal and fiduciary responsibilities of a board member.		
The board has clear policies and procedures.		
Board meetings are structured and productive.		
The board effectively monitors organizational performance and outcomes.		
A quorum is present for important decisions.		
The structural pattern (board, officers, committees, executive, staff) is clear.		

2. Strategic Oversight

Statement	Rating	Comments
I participate in setting strategic goals for the organization.		
The board reviews and approves the organization's annual budget.		
I contribute to evaluating organization programs for effectiveness and community impact.		

Statement	Rating	Comments
-----------	--------	----------

I help identify and mitigate risks to the organization.

3. Fundraising & Resource Development

Statement	Rating	Comments
-----------	--------	----------

I understand the organization's finances.

I contribute financially to the organization per my board member agreement.

I assist in fundraising efforts and donor cultivation.

I help connect the organization with community resources or partnerships.

4. Community Engagement & Advocacy

Statement	Rating	Comments
-----------	--------	----------

I understand how I can advocate for the organization with potential funders.

I understand how I can advocate for the organization with policymakers.

I am comfortable taking action to advocate for the organization.

I help the organization by building relationships with stakeholders and other potential collaborators

I help the board to understand community needs and trends.

5. Board Composition & Teamwork

Statement	Rating	Comments
The skills and expertise of board members meet the organization's needs.		
Board recruitment and onboarding processes are effective.		
Board members communicate openly and respectfully.		
I actively participate in meetings and discussions.		

6. Overall Performance

Statement	Rating	Comments
Overall, the board is effective in advancing the organization's mission.		
Participating on this board is meaningful.		
I am optimistic about the direction of the board.		
The board is open to improving its performance.		

Open-Ended Questions:

1. What do you think the board is doing well?

2. How could the board improve its work?

3. What training, support, or guidance is needed to help the board to serve more effectively?

4. What skills, expertise, or other representation could help fill gaps among board members?

5. Any additional comments or suggestions?