# HANDOUT #2

**Board Profile Worksheet Expertise/Skills/Personal Data (Source: BoardSource)**

This worksheet can be adapted by organizations to assess their current board composition and plan for the future. The governance committee can develop an appropriate grid for the organization and then present its findings to the full board.

In considering board building, an organization is legally obligated to follow its bylaws, which may include specific criteria on board size, structure, and composition. Or the bylaws may need to be updated to incorporate and acknowledge changes in the environment and community that have made changes in the board structure necessary or desirable.

Remember, an organization will look for different skills and strengths from its board members depending on its stage of development and other circumstances.

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|  | **Current Members** | | | | | | **Prospective**  **Members** | | | | | |
|  | 1 | 2 | 3 | 4 | 5 | 6 | A | B | C | D | E | F |
| **Age** |  |  |  |  |  |  |  |  |  |  |  |  |
| Under 18 |  |  |  |  |  |  |  |  |  |  |  |  |
| 19 – 34 |  |  |  |  |  |  |  |  |  |  |  |  |
| 35 – 50 |  |  |  |  |  |  |  |  |  |  |  |  |
| 51 – 65 |  |  |  |  |  |  |  |  |  |  |  |  |
| Over 65 |  |  |  |  |  |  |  |  |  |  |  |  |
| **Gender** |  |  |  |  |  |  |  |  |  |  |  |  |
| Male |  |  |  |  |  |  |  |  |  |  |  |  |
| Female |  |  |  |  |  |  |  |  |  |  |  |  |
| **Race/Ethnicity/Disability** |  |  |  |  |  |  |  |  |  |  |  |  |
| African American/Black |  |  |  |  |  |  |  |  |  |  |  |  |
| Asian/Pacific Islander |  |  |  |  |  |  |  |  |  |  |  |  |
| Caucasian |  |  |  |  |  |  |  |  |  |  |  |  |
| Hispanic/Latino |  |  |  |  |  |  |  |  |  |  |  |  |
| Native American/Indian |  |  |  |  |  |  |  |  |  |  |  |  |
| Other |  |  |  |  |  |  |  |  |  |  |  |  |
| Disability |  |  |  |  |  |  |  |  |  |  |  |  |
| **Resources** |  |  |  |  |  |  |  |  |  |  |  |  |
| Money to give |  |  |  |  |  |  |  |  |  |  |  |  |
| Access to money |  |  |  |  |  |  |  |  |  |  |  |  |
| Access to other resources  (foundations, corporate support) |  |  |  |  |  |  |  |  |  |  |  |  |
| Availability for active participation (solicitation visits, grant writing) |  |  |  |  |  |  |  |  |  |  |  |  |
| **Community Connections** |  |  |  |  |  |  |  |  |  |  |  |  |
| Religious organizations |  |  |  |  |  |  |  |  |  |  |  |  |
| Corporate |  |  |  |  |  |  |  |  |  |  |  |  |
| Education |  |  |  |  |  |  |  |  |  |  |  |  |
| Media |  |  |  |  |  |  |  |  |  |  |  |  |
| Political |  |  |  |  |  |  |  |  |  |  |  |  |

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|  | **Current Members** | | | | | | **Prospective**  **Members** | | | | | |
| Philanthropy |  |  |  |  |  |  |  |  |  |  |  |  |
| Small business |  |  |  |  |  |  |  |  |  |  |  |  |
| Social services |  |  |  |  |  |  |  |  |  |  |  |  |
| Other |  |  |  |  |  |  |  |  |  |  |  |  |
| **Qualities** |  |  |  |  |  |  |  |  |  |  |  |  |
| Leadership skills |  |  |  |  |  |  |  |  |  |  |  |  |
| Willingness to work |  |  |  |  |  |  |  |  |  |  |  |  |
| Personal connection with the  organization’s mission |  |  |  |  |  |  |  |  |  |  |  |  |
| **Personal Style** |  |  |  |  |  |  |  |  |  |  |  |  |
| Consensus builder |  |  |  |  |  |  |  |  |  |  |  |  |
| Good communicator |  |  |  |  |  |  |  |  |  |  |  |  |
| Strategist |  |  |  |  |  |  |  |  |  |  |  |  |
| Visionary |  |  |  |  |  |  |  |  |  |  |  |  |
| **Areas of Expertise** |  |  |  |  |  |  |  |  |  |  |  |  |
| Administration/Management |  |  |  |  |  |  |  |  |  |  |  |  |
| Entrepreneurship |  |  |  |  |  |  |  |  |  |  |  |  |
| Financial Management |  |  |  |  |  |  |  |  |  |  |  |  |
| Accounting |  |  |  |  |  |  |  |  |  |  |  |  |
| Banking and trusts |  |  |  |  |  |  |  |  |  |  |  |  |
| Investments |  |  |  |  |  |  |  |  |  |  |  |  |
| Fundraising |  |  |  |  |  |  |  |  |  |  |  |  |
| Government |  |  |  |  |  |  |  |  |  |  |  |  |
| International affairs |  |  |  |  |  |  |  |  |  |  |  |  |
| Law |  |  |  |  |  |  |  |  |  |  |  |  |
| Marketing, Public relations |  |  |  |  |  |  |  |  |  |  |  |  |
| Human resources |  |  |  |  |  |  |  |  |  |  |  |  |
| Strategic planning |  |  |  |  |  |  |  |  |  |  |  |  |
| Physical plant (architect, engineer) |  |  |  |  |  |  |  |  |  |  |  |  |
| Real Estate |  |  |  |  |  |  |  |  |  |  |  |  |
| Representative of clients |  |  |  |  |  |  |  |  |  |  |  |  |
| Special program focus (education, health, public policy,  social services) |  |  |  |  |  |  |  |  |  |  |  |  |
| Technology |  |  |  |  |  |  |  |  |  |  |  |  |
| Other |  |  |  |  |  |  |  |  |  |  |  |  |
| **Number of years (or terms) on the board** |  |  |  |  |  |  |  |  |  |  |  |  |

2