

An annual Education Foundation Self Assessment by board members and staff contributes to maintaining a healthy and successful foundation. Regardless of how long your foundation has been in operation, this assessment will help you determine where improvements can be made. The assessment takes less than 15 minutes to complete.

Foundation Name:					
	Yes	No	Partially		Date:
PROGRAMS AND ALLOCATIONS				1.	Do your foundation programs align with your district's funding priorities and/or strategic plan?
				2.	Do you meet with your district's superintendent at least annually to review the foundation's programs and activities?
				3.	Have you documented all recommendations from your district's superintendent, instructional staff and board of trustees?
				4.	Is information about all of the foundation programs on your foundation's website?
				5.	If the programs require an application, are the application and evaluation instrument for reviewing applications available on the website?
				6.	Are district staff members aware of the funding opportunities available through the foundation?
DEVELOPMENT				7.	Do you have software to effectively track all donations to the foundation and maintain a master list of donors?
				8.	Do you thank all donors within two business days and more than once?
				9.	Have you reached or exceeded your funding goals for the year?
				10.	Have you contacted five or more new donors within the last year?
				11.	Have you applied for at least three foundation grants this year?
				12.	Have you partnered with your district to apply for at least one collaborative grant this year?
				13.	Do you have an annual campaign and/or event to financially support the foundation's annual funding levels, including the endowment goals?
COMMUNITY RELATIONS				14.	Do you have a foundation website?
				15.	If you have a website, does your website include an option for online giving?
				16.	Do you have marketing collateral prepared, packaged, and at least 10 copies ready at all times?
				17.	Does a foundation representative have good rapport with the local media?
				18.	Have you distributed at least three press releases in the last year?
				19.	Do you conduct at least annual stakeholder satisfaction surveys, covering at least 50% of your stakeholders?
				20.	Are 70% of your donors satisfied or greatly satisfied with the results of the foundation?
				21.	Do the staff, students and parents within the school district know who the foundation is and what it does?
				22.	Do you have an Annual Education Foundation Report template?
				23.	Have you distributed an annual report every year to all stakeholders?

Foundation Name: _____

	Yes	No	Partially		Date:
ADMINISTRATION				24.	Do you have clearly defined vision and mission statements that can be easily articulated by each board member?
				25.	Are the following documents easily accessible: Bylaws, Articles of Incorporation, IRS Letter of Determination, signed Board Member Agreements, and complete contact information for all board members?
				26.	Can you locate the master copy of the foundation's Policy & Procedure Manual?
				27.	Can all board members locate their personal copy of the foundation's Policy & Procedure Manual?
				28.	Do all board members review the foundation's Policy & Procedure Manual at least once each year?
				29.	Do new board members attend Board Member Orientation prior to being elected or within one month of being elected and sign a Board Member Agreement?
				30.	Does your Board Member composition show diversity in all areas?
				31.	Do you file your 990 on time?
				32.	Is your annual financial audit complete, and is the next one scheduled?
				33.	Do you use agendas for all board and committee meetings?
				34.	Do you have minutes for all board and committee meetings, and are the minutes properly filed and easily accessible?
				35.	Do you have a five-year plan to ensure the foundation's success?
				36.	Do you have performance measures outlined for all aspects of your five-year plan?
				37.	Do you track and report on metrics of effectiveness in regard to all of your goals?
				38.	Are you meeting or exceeding your goals?
				39.	Do you submit a foundation report to the school district's Board of Trustees at least annually?
				40.	Have you taken action on all recommendations from the superintendent and the board of trustees? (Some may be marked as future items for action if not feasible immediately.)
				41.	Do you have an annual board retreat with 100% of your board members present to review and revise your five-year plan, actions, and associated measures of success?
				42.	Do you have three to five years of historical data including all performance measures to demonstrate ROI (Return on Investment)?
				43.	Do you have measurable performance objectives for all employees?
			44.	Do you conduct annual employee evaluations?	
			45.	Do you have corrective action plans with due dates for all "No" and "Partially" responses?	

Review your "No" and/or "Partially" selections to see where improvements can be made. Successful Ways, Inc. has tools to help Education Foundations develop, enhance, and/or refine these noted areas. (Resources: Successful Ways, Inc. and [A Guide to Education Foundation Policies and Procedures](#), by Dr. Elaine Free.)

Foundation Representative: _____ **Telephone:** _____

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