1. Introduction

This survey is a part of the information being gathered by the National Center for Family Philanthropy to assess the overall mission, governance, family dynamics, program, and administration of your family foundation. The survey's purpose is to collect board (and staff) members' ideas about the current status of the foundation.

The survey was designed by Alice Buhl, National Center Senior Fellow and Senior Associate at Lansberg, Gersick & Associates, in collaboration with a group of experienced practitioners. It is based in part on the research brought together in the National Center-commissioned book *Generations of Giving* by Kelin Gersick of Lansberg, Gersick & Associates.

We ask that you provide your name in order to track the completion of the survey, but your answers will be compiled with those of other board members without any attribution to specific individuals.

Each of the major sections concludes with an open-ended question if you wish to add comments. There is also an opportunity for you to add comments at the end of the survey.

*1. What is your name?

[   ]

*2. Please enter the survey code given to you by your foundation's facilitator.

[   ]

*3. Are you a board member or staff member?

○ Board member

○ Staff member

3. Governance

*8. How well is the foundation board organized to do the work of the foundation?

	Very low, needs serious attention	Low, needs some attention	Moderate; adequate for our foundation	High; a comparative strength of our foundation	Exemplary; a model for other foundations	N/A
Regularity & attendance at board meetings	○	○	○	○	○	○
Organization & management of board meetings	○	○	○	○	○	○
Understanding of board and officer roles & responsibilities	○	○	○	○	○	○
Decisionmaking processes articulated and understood	○	○	○	○	○	○
Communication with and/or between board members	○	○	○	○	○	○
Guidelines for board admin issues, such as expense reimbursement	○	○	○	○	○	○
Committee structures and assignments	○	○	○	○	○	○