

**Assessment and Initial Workplan**

<b>Elements of a successful board</b>	<b>Yes, we have this in place</b>	<b>We need to work on this</b>	<b>Next step</b>
We have the right members on our board at this time, representing the professional skills and affiliations that we need.			
Our board members have been sufficiently trained to provide effective oversight.			
Our board members are comfortable as our CDFI moves to the next level.			
The board chair understands his/her role and responsibilities and carries them out effectively.			
There is good, regular communication with the board chair.			
We have regular, productive board meetings.			
Our board meeting agendas are clear and effective.			

Elements of a successful board	Yes, we have this in place	We need to work on this	Next step
We have effective communication with our board through board packets and a “dashboard.”			
We have effective committees in place (the right committees, not too many)			