

YALSA Board Member Self-Assessment:

A tool to support continuous learning during your board tenure

The purpose of this assessment is to help individual board members create a tailored learning plan so they can strengthen key leadership and governance skills. First-year board members are asked to take the first quarter of their first board year to review and complete the assessment below. After that, board members are expected to work with their Board Mentor to draw up a learning plan, and during the remainder of your first board year, work with your mentor on implementation.

The following lists of questions are organized into categories. Board members are asked to answer the questions honestly to best gauge their knowledge in a variety of areas to determine what they should focus on to become more knowledgeable over their time on the board. After completing the checklist, review it with your mentor and use it to prioritize one or two key learning areas to be your focus for the first year. At the end of your first year on the Board, take time to reflect with your mentor on your successes and challenges, and think about where you want to take your learning in the next two years.

The Self-Assessment is for you to keep and refer to as needed throughout your tenure on the board. It does not need to be submitted. We recommend that you revisit the document at the start of each of your years on the board to mark your progress and think about where you want to go next.

Mission & Purpose of YALSA	No	A Bit	Yes
I understand the mission of the association and can accurately recite or describe the mission.			
I have a thorough knowledge of YALSA’s portfolio of book, media and member awards as well as book and media selected lists.			
I have a thorough knowledge of the association’s public-focused initiatives, including Teen Read Week™, Teen Tech Week™.			
I have a thorough knowledge of YALSA’s portfolio of continuing education offerings, including webinars, e-courses, licensed institutes, mentoring, and conference programming.			
I have a thorough knowledge of YALSA’s portfolio of publications, including blogs, periodicals, books, position papers, issue briefs, guidelines, competencies, and toolkits.			
I have a thorough knowledge of YALSA’s advocacy efforts and what it does to support teen services and library workers who serve teens, including YALSA’s portfolio of advocacy resources, involvement in National Library			

Legislative Day, implementation of District Days and other activities as identified by the board.			
I have a thorough knowledge of the variety of member engagement opportunities that YALSA offers to members, especially those beyond traditional committee work.			
I follow trends and important developments related to the areas on which the association focuses, as outlined in the Organizational Plan.			
I understand the need for a national association, such as YALSA, to have a social media policy for Board members and understand how I need to support that policy by participating in social media to ensure transparency in governance and to help get the word out about YALSA and the work that it does.			
Totals			

If you answered No or A Bit for 3 or more of the topics listed:

Get started

Take 5 minutes to make sure you are familiar with:

- The YALSA Mission Statement
www.ala.org/yalsa/aboutyalsa

Learn More

Once you are familiar with the Mission Statement spend 30 minutes learning more about recent initiatives of YALSA. As you read, make a list of initiatives that you were not familiar with or that you would like to know more about.

- Read the annual reports of the YALSA President and Executive Director from the last three years
www.ala.org/yalsa/aboutyalsa/annualreports/annual_reports

Consider the YALSA mission and recent projects within the context of information recently provided via surveys. Spend 60 minutes reading and analyzing survey results, as you read the results note new ideas that are sparked by the results and/or questions that the results bring to mind.

- Results from the most recent membership survey
<https://www.surveymonkey.com/results/SM-RW9CFKHF/>

If you answered no to specific items, learn what you can about them from YALSA’s web site:

- Book and media awards and lists: www.ala.org/yalsa/booklists
- Member awards: <http://tinyurl.com/YALSAawards>
- Teen Read Week™: www.ala.org/teenread
- Teen Tech Week™: www.ala.org/teentechweek
- Continuing Education: www.ala.org/yalsa/continuingeducation, www.ala.org/yalsa/yasymposium
- Publishing & Products: www.ala.org/yalsa/products%26publications
- Research: www.ala.org/yalsa/guidelines/research/research

- Advocacy: www.ala.org/yalsa/advocacy
- Member engagement: www.ala.org/yalsa/getinvolved/getinvolved
- YALSA Acronyms: http://wikis.ala.org/yalsagroups/index.php/YALSA_Acronyms (username: Board, password: Board_wiki)

Keep Up

- taking about 15 minutes each week and reading the YALSAblog’s section called “YALSA Info” <http://yalsa.ala.org/blog/category/yalsa-info/>
- read the weekly YALSA eNews when it is emailed to you each Wednesday
- read the monthly reports from the President and Executive Director that are emailed to you

Apply What You Learned

After expanding your knowledge on this topic please contact your Board Mentor to discuss learning and next steps in the assessment and knowledge acquisition process. Before contacting him/her, consider which of the next steps you would like to focus on. Next steps might include:

- Proposal of a project to the Board that focuses on a topic covered in the Board assessment, or pursued because of the Board assessment, and which will help YALSA move forward in a particular area.
- Facilitation of an ALA Connect discussion or e-chat with the Board on a topic related to learnings.
- Pursuing further learning via the options recommended in the Professional Development Section of the Board Wiki or my mentor.
- Compiling and sharing related resources with other Board members via the Board Wiki.
- Other: make your own suggestion of an activity that you think will help you and/or your Board colleagues better understand the topic.

The YALSA ALA Relationship	No	A Bit	Yes
I understand the structure of ALA and how YALSA fits into that structure.			
I know what the role of the ALA Executive Board is.			
I understand the role of ALA Council and how Divisions and Council interact.			
I understand the role of the Youth Council Caucus and how I can support the work of the group.			
I know how ALA Committees are appointed and the role Board members can play in the formation of those Committees.			
I understand how the ALA ballot is developed and how I can help in the formation of that ballot.			
Totals			

If you answered “No” or “A Bit” for 3 or more of the topics listed:

Get started

Take 5 minutes to read this overview of ALA’s organizational structure. As you read, write down one thing you didn’t know about ALA’s structure prior to reading the information:

- <http://tinyurl.com/6l2zhht>

Learn More

Then spend an hour or so gaining more understanding and getting more detail about ALA’s organization and how the Divisions like YALSA fit into it by reading these:

- <http://www.ala.org/aboutala/governance>
- ALA and YALSA Overview (this was on the USB you received in your orientation packet)
- This web page <http://www.ala.org/aboutala/governance/financialdata/treasurerspage> features 5 different webcasts about various ALA organizational matters, including:
 - ALA Organizational Structure & Decision-Making Process
 - ALA Operating Agreement

To learn a little about ALA Council and how it is relevant to the work of Divisions, watch this 15-minute video. As you watch, ask yourself, what is one thing I need to be paying attention to as a YALSA Board member when an issue comes to Council?

- <http://tinyurl.com/6ax5ljk>

Spend 10 minutes to get some quick facts about ALA’s legal framework, including information about its not-for-profit status and how that affects its tax status and ability to engage in political activity. As you read the information note any questions you have. Ask yourself, is there information here that I don’t quite understand?:

- ALA Legal Framework: 20 Questions & Answers
www.ala.org/aboutala/governance/legalguidelines

Then take an hour to get comprehensive information about ALA’s governance, by looking through the ALA Policy Manual. Note especially section 6.4.1, which is the Operating Agreement between ALA and its Divisions. As you read, ask yourself, what does this information tell you about how YALSA and ALA work together? How does this impact YALSA’s financial planning?

- ALA Policy Manual (especially Policy A.4.3.4.1)
www.ala.org/aboutala/governance/policymanual
- Operating Agreement, <http://ow.ly/q5CO30cCUCCE>

Keep Up

- Read the ALA President and Executive Director’s columns in *American Libraries*,
<http://americanlibrariesmagazine.org/>
- Attend Youth Council Caucus meetings at Annual and Midwinter, and follow their discussions in ALA Connect <http://connect.ala.org/youth-council-caucus>

Apply What You Learned

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of the next steps you would like to focus on. Next steps might include:

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- Facilitation of an ALA Connect or e-chat discussion with the Board on a topic related to learnings.
- Pursuing further learning via the options recommended in the Professional Development Section of the Board Wiki.
- Compiling and sharing related resources with other Board members via the Board Wiki.
- Other: make your own suggestion of an activity that you think will help you and/or your Board colleagues better understand this topic.

YALSA's Fiscal Environment	No	A Bit	Yes
I am familiar with the ALA Budget and Review Committee (BARC) and the role they play.			
I read and understand YALSA's financial statements.			
I am aware of state and federal charitable solicitation laws that apply to our organization and am confident that we are in compliance with such laws.			
I know what the term 501c3 means and what its implications are for YALSA in terms of generating revenue, fundraising, lobbying, sponsorships, etc.			
I know the basic purpose, responsibilities and function of a not-for-profit organization.			
I am familiar with YALSA's Business Plan and the impact it has on the financial decisions YALSA's Board makes.			
I know YALSA's primary sources of revenue and primary areas of expenditures.			
I understand the role that partnerships and sponsorships play in YALSA's financial picture.			
I understand what planned giving is and how it has a role in YALSA's finances.			
I understand Board member roles in supporting planned giving.			
I understand how YALSA's financial picture fits with that of ALA.			
Totals			

If you answered "No" or "A Bit" for 3 or more of the topics listed:

Get Started

Take 5 minutes to look at this Financial Primer. Note especially slides #31 & 32, which summarize the budget process and timeline and show you where the divisions fit into big ALA.

- ALA Financial Primer
<http://ow.ly/AvpL30cCUPu> (.pdf)

Learn More

Next, spend 30 minutes learning more about ALA's financial structure and budgeting process by exploring these resources:

- <http://www.ala.org/aboutala/governance/financialdata/finlearn>
- <http://www.ala.org/groups/mleader/budget>
- This web page <http://www.ala.org/aboutala/governance/financialdata/treasurerspage> features 5 different webcasts about various ALA financial matters, including:
 - ALA Organizational Structure & Decision-Making Process
 - ALA Operating Agreement
 - Budget Cycle and Process
 - The Long-Term Investment Fund - the Endowment

Next, spend 30 minutes reading through YALSA's Business Plan. As you read, take note of areas you were unfamiliar with or would like to know more about: <http://ow.ly/euNp30cCV2f> (.pdf). Then spend 20 minutes looking at this presentation on the Board's Role in Fundraising. What's one new idea that you have about how you can support the Board member roles in this area?

http://connect.ala.org/files/115457/Fundraising_BoardRole.pptx

Keep Up

- Read fiscal reports posted on the ALA web site
www.ala.org/aboutala/governance/financialdata/financialrpts/financialrpts
- Read annual reports on economic impact from <http://www.mckinley-advisors.com/resources/> and the regular blog posts from the Nonprofit Assistance Fund
<http://www.nonprofitsassistancefund.org/blog/>
- The Chronicle of Philanthropy hosts live and on-demand webinars:
<https://www.philanthropy.com/webinars?cid=UCOPNAVTOP>

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 - Pursuing further learning via the options recommended in the Professional Development Section of the Board Wiki.
 - Compiling and sharing related resources with other Board members via the Board Wiki.
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- Other: make your own suggestion of an activity that you think will help you and/or your Board colleagues better understand this topic.

YALSA Governance	No	A Bit	Yes
I am familiar with the 12 Principles of Governance that Empower Effective Boards as outlined by BoardSource.			
I understand the role of the Executive Director in the association.			
I understand the roles of the YALSA staff members, and what each person's area of specialty is.			
I understand the relationship between the Executive Director and the Board.			
I understand the role of the YALSA Executive Committee.			
I understand the relationship between the Executive Committee and the Board.			
I am familiar with the ways in which the Executive Committee works with ALA and other Divisions.			
I understand the Board member's role in supporting the work of YALSA's Board Development Committee.			
I know how meeting agendas are developed for Board and Executive Committee meetings and I actively take part in that development.			
I understand my role and responsibilities as a Board Liaison to appointed member groups.			
I understand the purpose of Standing Board Committees and my role as a member of one.			
Totals			

If you answered No or A Bit for 3 or more of the topics listed:

Get Started

Start by spending 20 minutes learning more about what makes for successful association governance. As you read through the document listed below, consider the ways in which you see the YALSA Board successfully demonstrating the principles, the areas in which you have questions, and areas in which you think the YALSA Board might improve:

- The 12 Principles that Empower Exceptional Boards. <http://ow.ly/nHPR30cCW4o>
- Nonprofit Governance: The Last 20 Years https://www.youtube.com/watch?v=A_vsK5FuwIw

Learn More

Once you have read through the principles of effective association governance spend 60 minutes reading through information on the YALSA Executive Committee and the duties of Board members. As you read, take note of the areas in which you think the work of these groups can help the association Board achieve the 12 principles:

- Board Duties
www.ala.org/yalsa/aboutyalsa/yalsahandbook/boardduties
- YALSA Podcast: Board Member Roundtable
<http://tinyurl.com/3zqkjj5>
- Scope and Responsibility of the Executive Committee
www.ala.org/yalsa/workingwithyalsa/committees/exccommittee
- Executive Committee Duties
www.ala.org/yalsa/aboutyalsa/yalsahandbook/dutiesresponsibilities

Keep Up

- Read the YALSA President & Executive Director monthly reports that are emailed to you
- Access the sites, blogs, etc. in the Resources for Association Governance section of the Board Wiki, http://wikis.ala.org/yalsagroups/index.php/Resources_for_Association_Governance (username: Board, password: Board_Wiki)

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- Other: make your own suggestion of an activity that you think will help you and/or your Board colleagues better understand this topic.

Board Leadership	Yes	A Bit	No
I know and demonstrate the skills, knowledge, and attributes required to be a successful leader in a national organization.			
I am well-versed in the association’s Organizational Plan and the role that Board members have in helping YALSA meet the goals of the plan.			
I understand the role that appointed member groups play in supporting the YALSA Organizational Plan and can articulate to group members and chairs			

what that role is.			
I am familiar with the Bylaws of the association and how they govern the work of members and the Board.			
I understand the role that communication and social media plays in my work as a Board leader.			
I understand how to effectively communicate with members, using a variety of tools, to promote Board transparency, increase members' knowledge of how governance works, and get the word out about the work of YALSA and how members can be involved in that work.			
I understand the role that I should take on as a leader in the organization with members.			
Totals			

If you answered No or A Bit for 3 or more of the topics listed:

Get Started

Start by choosing one of these 30 recommended Ted Talk videos on leadership to view:

<https://www.inspiringleadershipnow.com/best-ted-talks-on-leadership/>

Learn More

Spend 30 minutes reading two articles from *Harvard Business Review* on leadership. As you read, consider how the information in the articles represents how you see your role on the YALSA Board and how you demonstrate leadership on the Board. Answer the question, how can I be a better YALSA leader?

- How to be an Inspiring Leader, Harvard Business Review, April 2017
<https://hbr.org/2017/04/how-to-be-an-inspiring-leader>
- The Focused Leader, Harvard Business Review, December 2013,
<https://hbr.org/2013/12/the-focused-leader>

After listening to a video and reading the articles, take 30 minutes to read about and view the presentation by Beth Kanter titled *Creating Your Organization's Social Media Strategy Map*. As you spend time with this resource, consider how the strategies that Kanter mentions relate to the leadership skills you thought and heard about when listening to the Fiorina podcast. Answer the question, how does social media fit into your role as a YALSA leader?

- <http://tinyurl.com/bg5nr6>

Keep Up

- Listen to or watch a free podcast or webcast from the American Management Association
<http://www.amanet.org/training/web-events.aspx?SelectedSolutionType=Web%20Events>

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of the next steps you would like to focus on. Next steps might include:

- Proposal of a project to the Board that focuses on a topic covered in the Board assessment, or pursued because of the Board assessment, and which will help YALSA move forward in a particular area. If the proposal is approved by the Board the Board member who initiated the proposal maybe be asked to spearhead implementation
 - Facilitation of an ALA Connect or e-chat discussion on a topic related to learnings.
 - Pursuing further learning via the options recommended in the Professional Development Section of the Board Wiki.
 - Compiling and sharing related resources with other Board members via the Board Wiki.
 - Other: make your own suggestion of an activity that you think will help you and/or your Board colleagues better understand this topic.
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For More Information

Visit the “Resources for Association Governance” and “Professional Development” sections of the Board Wiki http://wikis.ala.org/yalsagroups/index.php/Board_of_Directors (username: Board, password: Board_Wiki) and also try:

YALSA and ALA

- ALA Structure, Organization, Governance
<http://tinyurl.com/6l2zhht>
- ALA Constitution and Bylaws
www.ala.org/aboutala/governance/constitution
- ALA Executive Board Job Description,
http://www.ala.org/ala/aboutala/governance/officers/ebd_mem_job_descrip.pdf
- ALA President and Executive Director Job Description and Responsibilities,
<http://bit.ly/QrPuyn> (.pdf)
- ALA Council: Composition and Charge, www.ala.org/aboutala/governance/council
- Youth Council Caucus, <http://connect.ala.org/node/81259>
- Three most recent years’ worth of YALSA Fiscal Officer Reports, submitted as documents for Midwinter & Annual meetings,
www.ala.org/yalsa/workingwithyalsa/board/documents

Fundraising and the not-for-profit sector

- Nonprofit Assistance Fund: resources and training:
<http://www.nonprofitsassistancefund.org/>
- Chronicle of Philanthropy (incl. live discussions & webinars)
<http://philanthropy.com/section/Home/172/>
- Foundation Center: <http://foundationcenter.org/> (e-courses, videos and webinars)