

CBF Skills-Based Board Candidate Assessment Scorecard

Based on the information provided, assess the candidate against the priority competency area(s) and the Board composition considerations below.

Candidate Name:

Evaluator (Nominations Committee Member):

Date:

Evaluator declaration: ☐ I have no conflict that would impair my objectivity. ☐ A conflict has been disclosed and appropriate management or recusal is required.

Part 1: Priority Competency Evaluation

Priority Competency Area(s): _____

1. Conservation Finance and Environmental Fund Management	Environmental fund management, endowment stewardship, grant-making and innovative finance.
2. Biodiversity Conservation	Caribbean biodiversity, ecosystem-based adaptation, and marine or terrestrial conservation.
3. Risk Management and Investment Oversight	Financial management, investment oversight, fiduciary risk, audit and compliance.
4. Strategic Communications and Stakeholder Engagement	Strategic communications, stakeholder engagement, public affairs and organisational positioning.
5. Advocacy, Partnerships and Resource Mobilisation	Resource mobilisation, donor relations, partnerships and advocacy for Caribbean conservation.
6. Legal and Corporate Governance	Legal expertise, governance frameworks, compliance and governance administration.
7. Institutional Development and Capacity-Building	Organisational growth, institutional strengthening, capacity development and change management.

Assess the candidate principally against the priority competency area(s) for which they are being considered. Record evidence in the Notes column.

Scoring Scale: 3 = Strong Evidence | 2 = Adequate Evidence | 1 = Limited Evidence | 0 = No Evidence

Area of Focus	Sub-Area	Criteria	Score (0-3)	Notes
Foundational Credentials	Relevant Qualifications	<i>Relevant qualifications or equivalent demonstrated expertise.</i>		
	Current Knowledge	<i>Current knowledge and ongoing professional development.</i>		

Applied Experience	Relevant Experience	<i>Depth and duration of senior-level experience in the competency.</i>		
	Depth & Complexity	<i>Experience leading complex, high-stakes or multi-country work.</i>		
	Judgement / Problem Solving	<i>Sound judgement in complex strategic, fiduciary, governance or operational matters.</i>		
Thought Leadership	Knowledge Sharing	<i>Mentoring, advising, training or capacity-building experience.</i>		
	Sector Contribution	<i>Contribution to policy, practice, research or professional networks.</i>		
Execution & Impact	Strategic Influence	<i>Advises Boards or senior leaders and shapes organisational or regional strategy.</i>		
	Results & Impact	<i>Evidence of relevant institutional, financial, conservation, partnership or resource-mobilisation results.</i>		
TOTAL PRIORITY COMPETENCY SCORE (max. 27)				

Part 2: Strategic and Board Composition Assessment

Assess the candidate against the Board's priority skills gaps, Caribbean context, independence, overall composition and readiness for Board service.

Scoring Scale: 3 = Strong Evidence | 2 = Adequate Evidence | 1 = Limited Evidence | 0 = No Evidence

Strategic Metric	Description / Assessment Criteria	Score (0-3)	Evaluator Notes / Justification
Priority Skills Gap Alignment	Addresses one or more priority skills identified through the Board skills assessment.		
Caribbean / Regional Experience	Demonstrates substantive Caribbean knowledge or professional experience relevant to CBF.		
Independence and Conflicts	Can exercise independent judgement; actual, potential or perceived conflicts are disclosed and manageable.		
Board Composition and Diversity	Contributes to balance of gender, geography, professional background and perspectives.		
Board Readiness and Capacity	Demonstrates Board judgement, willingness to undertake induction or training, and time capacity.		
TOTAL STRATEGIC SCORE (max. 15)			

Part 3: Nominations Committee Recommendation

Record the evaluator's recommendation for Committee moderation. The Nominations Committee will make any consolidated recommendation to the Board of Directors.

Scores support, but do not replace, Committee judgement. Any automatic threshold should be formally approved before the scorecard is used.

Score:

Priority Competency Score	
Strategic Score	
TOTAL	

Overall Strengths: (List the top 1-2 reasons this candidate stands out)

☐

☐

Areas of Concern / Need for Clarification: (List any gaps, risks or questions requiring follow-up)

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Evaluator Recommendation:

☐	Highly Recommended for Shortlist (Strong priority-skill fit and strong strategic alignment)
☐	Recommended for Shortlist (Meets the required competency and Board composition needs)
☐	Retain in Candidate Pool (Qualified, but not aligned with the current priority gap or timing)
☐	Do Not Advance (Insufficient evidence, material concern or unmanageable conflict)