



# **SUCCESSFUL BOARD SELF-ASSESSMENTS**

Considering the important role the board has within a nonprofit, why would any organization be content with a sub-standard board — a board with inadequate performance and fulfillment of its responsibilities — and not be open and willing to improve its members' individual and collective performance? The best way to make the case for board improvement is to conduct periodic board self-assessments to identify your board's strengths and areas in need of improvement.

### Why assess performance?

Board self-assessment provides you with the opportunity to

- look internally at the board itself
- reflect on your board members' individual and shared responsibilities
- identify different perceptions and opinions among board members
- determine areas of responsibility that need attention
- use the results as a springboard for board improvement
- increase the level of board teamwork
- clarify mutual board/staff expectations
- clarify common objectives as well as check that everyone is speaking the same language, i.e. ensuring that everyone abides by a shared vision
- demonstrate accountability as a serious organizational value
- display credibility to funders and other external audiences

### Getting ready

Planning well is half the battle. Here are some tips that help board members get excited about the assessment process and prepare for it.

- Include periodic self-assessment among your bylaws clauses. It is the surest method to make the case for assessment if your bylaws include it as one of the principle policies for the board.
- Task the governance committee (not your chief executive or the chair) to ensure that assessment takes place regularly and is well organized. This committee is the permanent structure of your board; officers and chief executives change. Also self-assessment is a board commitment; when the call for action comes from within the team, the “voice” is different.
- Plan to conduct a self-assessment every two to three

years. It is not necessary to conduct one every year — you need time to implement any potential changes and learn new ways to function as a board.

- Your auditing firm, as an outside monitor, should also make sure that the processes in the bylaws get respected.
- Keep in mind that it is not going to be an organizational assessment. The entire focus is on the board, on its work, structure, and dynamics.

### Making process work

How the board conducts a self-assessment influences how successful it will be while securing its role as a standard process.

- Clarify the purpose of self-assessment to everyone. It is not to be judgmental or focus only on weaknesses and negative aspects. Its purpose is to help the board get to the next phase of development. One of its benefits is to act as a planning tool for the board.
- Discuss the questionnaire your board has chosen to use to make sure everyone is familiar with the process and has a chance to ask detailed questions.
- Expect confidentiality. Opinions and comments expressed during the process should not be attributed to individual board members but should be shared in the aggregate report. Confidentiality is the only way to ensure that everyone shares honest opinions without a filter or fear of being criticized.
- If possible, rely on an outside facilitator to collect the completed questionnaires, analyze the comments, and provide the full board with a report. This third party confidentiality brings an added level of neutrality to the end discussion.
- Keep in mind that comments and opinions are simply perceptions of board members. There are no wrong answers.
- Provide each board member with the opportunity to comment on how he/she assesses his/her own performance vis-à-vis the full board. It is often quite educational to see the results. Not surprising, but often, board members see themselves in a better light than they see the full board's performance.
- Include your chief executive in the process. Even if the chief executive is not a voting member of the board, he/she works closely with the board and should have an insightful perspective of the board's effectiveness.

- Make sure that the results of the assessment get shared with the full board and action is taken afterwards. No follow up is the worst consequence to self-assessment.

For some boards, the first self-assessment experience feels awkward and somewhat daunting. However, if the process and the consequences are accepted, the first assessment should result in a beneficial learning experience. Embarking on a second assessment proves that the board has learned the importance of monitoring its own effectiveness. Assessment is about the future and ensuring that the board's contribution to the organization is always top quality.

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