

BOARD SELF-ASSESSMENT FOR THE BOARD

Introduction

At a regular physical check-up, the doctor may begin by asking the patient, "How are you feeling?" The answer is important. Although some patients may feel well but have a hidden disease, the patient's own sense of wellbeing is still an important indicator. In a similar way, when a board asks itself, "How do we feel about our board and our organization?" the answer is a useful indicator, if not an error-proof test. An annual poll of board members lets the board get a sense of how its members feel. There are many such surveys, but here's a short one you can try.

Give board members a scale to choose from for each answer, such as 1 - 5 , with 1 being Not Confident and 5 being Very Confident. You might also ask your executive director (and other staff who frequently work with the board) to fill out a similar survey, and then use the results of both to kick off a discussion where people reflect on the survey results and establish objectives for the year about board activities.

BOARD SELF-ASSESSMENT SURVEY

Please rate your assessment of the Board of Directors' performance on a scale of 1 – 5, with 1 = Not At All Confident, and 5 – Very Confident.

How confident are you that as an effective governing body, the board:

Question	1	2	3	4	5	Notes
1. Monitors and evaluates the performance of the executive director on a regular basis?						
2. Ensures legal compliance with federal, state, and local regulations?						
3. Ensures that government contract obligations are fulfilled?						
4. Monitors financial performance and projections on a regular basis?						
5. Has a strategic vision for the organization?						
6. Has adopted an income strategy (that combines contributions, earned income and other revenue) to ensure adequate resources?						

Question	1	2	3	4	5	Notes
7. Has a clear policy on the responsibilities of board members in fundraising?						
8. Has adopted a conflict of interest policy that is discussed regularly?						
9. Currently contains an appropriate range of expertise and diversity to make it an effective governing body?						
10. Regularly assesses its own work?						

How confident are you that most or all board members:

Question	1	2	3	4	5	Notes
11. Understand the mission and purpose of the organization?						
12. Are adequately knowledgeable about the organization's programs?						
13. Act as ambassadors to the community on behalf of the organization and its constituencies?						
14. Follow through on commitments they have made as board members?						
15. Understand the role that volunteers play in the organization?						
16. Understand the respective roles of the board and staff?						
17. Are appropriately involved in board activities?						

Please comment:

18. What information—whether about the organization, the field (such as immigration), nonprofit management or nonprofit boards—would you like to get to help you be a better board member?

19. When you joined the board, did you have ideas on how you would help the organization that haven't happened? If so, what ideas?

20. What suggestions/questions do you have for the board chair or the executive director about the board, your own role, or any other aspect of the organization?

21. Would you like the board chair to contact you about getting together?

22. Would you like the executive director to contact you about getting together?