# Board Self Assessment/Evaluation

Just as the board monitors and assesses the work of the staff, the board must also turn its attention to its own responsibilities and accomplishments. An annual board self-assessment has several important benefits:

* Determining the criteria for the assessment is a good mechanism by which the board can develop its values and set standards for itself,
* By conducting a survey of all board members, the board can take a look at itself as a whole, including those who are quiet at meetings,
* Over time, assessments provide feedback to the board officers and to the executive director on how well the board works together.

What follows is a copy of the self-assessment questionnaire for boards. Each board member can complete this or a similar assessment anonymously.

Once the survey answers are tallied, the compiled information should be presented to the board. Based on the survey results, the board can see which areas of its own affairs call for greater attention over the next year. For example, if some board members are satisfied that the board is adequately informed about the organization’s programs and services while others are not, perhaps a tour of the facility and a special briefing can be held for the hour preceding a board meeting for those board members who would like to be better informed.

**Annual Board of Directors Self-Assessment**

The Board is responsible for completing a self-assessment of its performance annually.

Your responses will be held confidential – no one comment will be attributed to an individual. A report that summarizes all responses, including comments, will be presented at an upcoming meeting.

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| --- |
| Your Name (reviewer): |
| Year being assessed: | Today’s Date: |

**Section 1: Assessment of the Board as a Whole**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Overall**, how well do you think the board fulfills its governance responsibilities? | **Excellent****4** | **Fair** **3** | **Good****2** | **Poor****1** |
| **Rate your confidence in the following governance functions performed by the board:** | **Very Confident** |  |  | **Not at all Confident** |
| **Mission**: The board understands the mission and purpose of the organization. | 4 | 3 | 2 | 1 |
| **CEO**: The board monitors and evaluates the performance of the CEO on a regular basis, and delegates the day-to-day management to the CEO. | 4 | 3 | 2 | 1 |
| **Programs**: The board approves an annual operating plan, monitors implementation, and makes sure there are program evaluations to measure impact. | 4 | 3 | 2 | 1 |
| **Planning**: The board participates with staff in determining program and administrative strategies and overall long-term priorities. | 4 | 3 | 2 | 1 |
| **Financial Oversight and Viability**: The board safeguards assets from misuse, waste, and embezzlement through financial oversight and making sure that effective internal controls are in place. The board makes sure that organization has an overall fundraising strategy to support the effective delivery of services, and monitors the implementation of the funding plan. The board ensures a realistic budget that maximizes use of resources. | 4 | 3 | 2 | 1 |
| **Policies**: The board approves governing policies and reviews them periodically to ensure policies are up to date and relevant.  | 4 | 3 | 2 | 1 |
| **Legal**: The board ensures the organization is compliant with federal, state, and local regulations and fulfillment of contractual obligations, including payment of payroll taxes and filing of required reports. | 4 | 3 | 2 | 1 |
| **Evaluation**: The board regularly assesses whether the organization is achieving its purpose (effectiveness), at what cost (efficiency), and is meeting the needs of the community. | 4 | 3 | 2 | 1 |
| **Board effectiveness**; The board ensures effective governance through evaluation of the board itself, committees, and its leadership, and ensures the board’s own continuity. | 4 | 3 | 2 | 1 |
| **How satisfied are you regarding board composition and processes in place that support board effectiveness?** | **Very Satisfied** |  |  | **Not at all Satisfied** |
| The board has a clear policy on the responsibilities of board members in fundraising. | 4 | 3 | 2 | 1 |
| Board members clearly understand their board responsibilities, and fulfill them. | 4 | 3 | 2 | 1 |
| The board currently contains an appropriate range of expertise and diversity to make it an effective governing body. | 4 | 3 | 2 | 1 |
| The board regularly assesses its own work. | 4 | 3 | 2 | 1 |
| The board actively recruits, orients and trains new board members, and removes those members who are not fulfilling their agreed upon responsibilities. | 4 | 3 | 2 | 1 |
| The board encourages and supports individuals to treat fellow board members and staff with trust, respect, and understanding. | 4 | 3 | 2 | 1 |
| Board and committee meetings are interesting, well run, and effective. | 4 | 3 | 2 | 1 |
| The board has the necessary effective board leadership – an individual and/or group of individuals who are willing and able to help the board fulfill its governance and support functions. | 4 | 3 | 2 | 1 |
| **Comments** **regarding any of your ratings above:** |

**Section 2: Assessment of Your Fulfillment of Responsibilities**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **How satisfied are you with your fulfillment of your own support responsibilities?** | **Very Satisfied** |  |  | **Not at all Satisfied** |
| **Fundraising**: I participate with staff and fellow board members in raising adequate financial and other resources. | 4 | 3 | 2 | 1 |
| **Public Relations**: I act as an ambassador to the community on behalf of the organization and its clients. | 4 | 3 | 2 | 1 |
| **Volunteerism**: As needed, I volunteer to assist staff and/or recruit new volunteers. | 4 | 3 | 2 | 1 |
| **Advises staff in areas of expertise**: I act as a sounding board for the CEO and other executive staff upon request and when invited. | 4 | 3 | 2 | 1 |
| **Credibility**: I lend my name and personal reputation to the organization to use in brochures, grant proposals, and other marketing materials. | 4 | 3 | 2 | 1 |
| I understand and fulfill my **governance and support responsibilities** as a member of the board. | 4 | 3 | 2 | 1 |
| I am **knowledgeable** about organization’s **mission, programs and services.** | 4 | 3 | 2 | 1 |
| I come **prepared** to board and committee members and **follow through** on commitments. | 4 | 3 | 2 | 1 |
| **Comments** **regarding any of your ratings above:** |

**Section 3: Assessment of Your Board Colleagues’ Fulfillment of Responsibilities**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Overall,** how well do you think your board colleagues do in fulfilling their support responsibilities? (Fundraising, public relations, volunteerism, advising as needed, adding credibility, understanding roles, knowledgeable about programs and services, and following through on commitments?) | **Excellent****4** | **Fair** **3** | **Good****2** | **Poor****1** |
| **What recommendations and/or comments do you have regarding your board colleagues’ fulfillment of support responsibilities?** |
| **1. What have been the greatest accomplishments and impacts of the Board this past year?** |
| **2. How have you personally contributed to those accomplishments and impacts?** |
| **3. What changes or suggested improvements do you have for the board?** |
| **4. Any other comments regarding the performance of the board or your service as a board member?** |