

Board Self-Assessment

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Boardsource.org strongly recommends and says that one of the ten responsibilities of a board is self-assessment. Think of a highly functioning board and a common denominator is likely that it is a board that is aware of its strengths and weaknesses with an eye towards ongoing improvement.

Generally, the board committee that handles board nominations or development is in charge of administering and collecting the information. However, in some organizations the Executive Director will manage on behalf of the chair of the board.

The good news about this practice is that self-assessment is easy to implement. The first step is to determine what part of board functioning to assess:

1. Should the effectiveness of the meeting be evaluated? Some boards will ask at the conclusion of each meeting, how did the meeting go? Did the board abide by meeting norms such as starting and ending on time? Did the board accomplish the meeting goals? Was there active member engagement?
2. A board that desires information about its productivity and accomplishments would ask about board role clarification, accomplishment of goals and alignment of board work to meeting the vision and mission of the organization.
3. If the board wants information about structure; questions that assess that would include size of board, committee structure and board leadership selection.

Once the board knows what to assess the next step is what format will be best? Data collection techniques include questionnaires or interviews. An advantage of the questionnaires is that they can be easy to administer through an online tool such as Survey Monkey and kept confidential. Interviews allow for extra probing and the time to connect with the board member.

The third step is to determine how often assessment should occur. Once a year is most common but depending on the board, more often (such as a quick check in at the end of the meeting) will work.

Once the decision is made about what, how and when to assess and the process is complete, the most important task, yet sometimes overlooked, is what to do with the information and taking action on the data. It is better to not self-evaluate if nothing is going to be done with information collected. The first action should be feedback on the board responses including themes and patterns that emerge from the assessment. Some board will use the results to frame the next board retreat while others will use the data to set strategic initiatives, such as board improvements or identifying needed board members.

Being willing to self-assess, the board can improve its abilities and enhance what it already does well.