

Board Self-Evaluation Tool

The following is intended as an ongoing performance assessment tool for your board.

This tool can provide a snapshot of the dynamic of communication, accountability, and leadership among your board. While this is intended for group use, there is certainly value in using this tool on your own as well. If you are evaluating your board on your own, take notes on areas of strength to build on, opportunities for improvement, and process points that come to light and would be valuable for group discussion.

Using this tool with your entire board can be a very powerful. It is recommended that the board evaluate itself at regular intervals – maybe once a year with follow-up questions sooner on major opportunities for improvement. We also suggest that you ask everyone to fill this out anonymously and then discuss the compiled responses.

Alternatively, it may also make sense for your board to just have an open discussion around each question. Either way, the important part is to get at the “how’s” and “why’s” behind your answers – focus on how to build on areas where you are satisfied with your board dynamic, and on how to work on areas that can be improved.

Please rate your reaction to the following statements on a scale of 1 to 7 using the following metrics:

- | | |
|---|----------------------------|
| 1 | strongly disagree |
| 2 | |
| 3 | |
| 4 | neither agree nor disagree |
| 5 | |
| 6 | |
| 7 | strongly agree |

Board Role

- The board provides leadership in articulating the mission of the organization such that it guides the organization on how to best address the social issue at hand. ____
- The board provides leadership in articulating the strategy of the organization to accomplish its mission and manages staff to see the strategy through to implementation, achieving maximum possible social impact as a result. ____

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- The board's work on the organization's mission takes into account the current set of resources.____
- The board is proactive about identifying additional resources needed for further impact.____
- The board revisits the organization's mission and strategy at regular intervals.
- The board changes its articulation of mission and strategy as necessary when there is opportunity for greater impact, or when changes in the social issue at hand call for a new model.____
- Board members have specific domains of responsibility for providing strategic guidance, including functional areas such as operations, marketing, finance, etc.____
- All functional areas where staff would need strategic guidance are covered, and there are no significant gaps.____

Board Communication

- Board members feel comfortable disagreeing on key points.____
- Board members present different points of view and play devil's advocate on strategic issues as much as would take place in a corporate setting.____
- Board members routinely revisit why certain ways of operating "are as they are" within the organization.____
- Board members frequently suggest potential alternate ways of doing things from the status quo.____
- Board members take into account all viewpoints being discussed.____
- Board members see discussions through until they are resolved and identify concrete steps for moving forward.____

Accountability

- Specific data is available to assess the performance of the organization's programs.____
- Specific data is available to assess the performance of the organization as a whole in providing a comprehensive strategy for achieving social impact.____
- The board regularly sets performance goals.____
- The board reviews these data regularly, discusses drivers of success, and exposes core issues when performance numbers fall short of targets.____
- The board takes as much responsibility as staff for the performance of the organization.____
- The board routinely examines whether the organization is using resources and staff time in the most effective manner.____
- Board members make good on their commitments within the board.____
- Board members are accountable to the staff for providing reliable direction and strategic assistance.____

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- The board regularly asks itself whether it is achieving the maximum possible impact given the resources at hand. ____

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Staff Relationship

- The executive director typically comes to the board with specific problems for assistance.____
- The board and executive director openly share responsibility for the organization's results.____
- The executive director can seek assistance from the board when performance targets are not met.____
- The board provides sufficient strategic direction to enable staff to implement operations accordingly.____
- The board and executive director have a shared understanding of the board's role in providing guidance to staff.____
- The board and executive director have a shared understanding of the staff's role in implementing strategy set and articulated by the board.____
- The board and staff share a common understanding of the strategy of the organization.____

Collaboration

- The board consistently examines potential for collaboration with other agencies, and examines the potential value of these collaborations as well as the potential for cost savings.____
- The board is actively involved in establishing a network with boards of other relevant nonprofits.____
- The organization collaborates with other groups to share services that are not part of the organization's core mission and strategy.____
- The organization effectively conserves resources and costs through these partnerships.____
- The organization engages in partnerships with other agencies that have complementary services in order to more effectively serve those in need.____
- The board looks for outsourcing and other opportunities as rigorously as it would in the private sector.____

Results

- The organization is effective in helping others in the manner stated by its mission and strategy.____
- The organization is using resources in the manner most aligned with its mission and strategy possible – i.e., there is no potential change that could serve to achieve greater impact.____
- The organization's program and services are in line with the organization's mission.____
- The organization's program and services all contribute significantly to the organization's mission.____

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- The organization is achieving the greatest possible outcomes given the resources it has.____
- The quality of the organization's outcomes stays consistent as the number of outcomes grows.____

Individual Roles

- Each member has a shared understanding of her/his role with the board.____
- Board members can count on one another to follow through on what they say they will do in a timely manner.____
- Board members have the resources they need to perform their functions.____
- Board members know what their roles, responsibilities, and areas of expertise are.____
- Board members know what each other's roles, responsibilities, and areas of expertise are.____
- When board members raise issues that need time devoted to them, others will pitch in and devote time to help find a solution.____