

BOARD SELF-ASSESSMENT FAQs

WHY DO ONE?

If you don't know where you are, it's hard to know where you are going.

As with any high functioning team, in order to provide the strategic leadership needed, nonprofit boards periodically need to step-back and assess their progress, needs for improvement and strengths to build on going forward.

The process of engaging in a board assessment is where the most value is derived. As board members participate in talking about board performance, what they believe the board is doing well and where they see areas for improvement, the board as a leadership team advances.

Like any group made up of individuals, there can be a wide variety of perspectives and experience levels from person to person on the board. The process of intentionally setting aside time to annually or bi-annually involve the board in a self-assessment survey creates a culture of openness and learning across the organization.

Taking stock in how the board is functioning via an assessment also allows the board, as a whole, to understand where more board training may be needed, to learn if board members are having different levels of satisfaction, and to create a road map for board building.

WHAT DOES A TYPICAL BOARD-SELF ASSESSMENT INVOLVE?

The point of any assessment is not to focus on a "grade" or ranking. Rather it is an opportunity to see what is working well within the board and what may be holding a board back from functioning at a higher level. The results provide an excellent way to begin the conversation around closing those gaps.

A board self-assessment can be as simple and straightforward or as complex as the board feels is warranted. The surveys are often delivered electronically and board members take them anonymously, during a specific time period. Organizations often use an online survey tool, such as Survey Monkey.

The type of assessment used depends on the life-stage of the board. Some boards, especially new to assessing their performance, may ask a series of 10-15 basic questions such as "do new board members receive an effective orientation? Are the board meetings run with an effective agenda?"

As an organization matures, it often opts to use a more complex assessment that includes a series of in-depth questions which focus on the board's strategies and its growth in areas such as fundraising, succession planning, fiscal oversight, etc. While these types of surveys require more board time to complete, the results provide more in-depth information on board needs, strengths and culture.

HOW DO WE GET STARTED?

Boards typically begin by charging a committee (often Governance Committee) with:

- Laying the foundation in the board room about the value of self-assessment



- Gaining input from the board about the areas they would like to assess
- Selecting or creating the assessment tool which fits their boards' needs
- Implementing the process
- Synthesizing the results into a clear report for the board
- Engaging the board in a discussion about the results, next steps and a plan for board improvement.

ARE THERE READY-MADE ASSESSMENT TOOLS?

The NH Center for Nonprofits has partnered with the Corporate Fund to offer a complete and easy-to-use assessment tool. The Corporate Fund's Board Self-Assessment was authored by Ed Tomey, nonprofit consultant and educator.

Visit www.nhnonprofits.org/board-self-assessment to access this tool. Other samples can be found on www.NonprofitNext.org.

WHAT IF THERE IS RESISTANCE ON THE BOARD?

It's natural for some people to relate to an assessment as a "test" so it is important to take time in explaining that this is not a test, but a time to learn.

OVERCOMING THE RESISTANCE

Find some champions on the board – often those who have taken assessments in the past -who are willing to express their support from within the group – avoid the "top-down" approach.

Set aside time at a board meeting to **allow people to learn about the value of an assessment** and the time commitment required to participate.

Make it easy – set up a way for board members to fill out the form at the meeting!

Ask **someone from another organization** to come in and talk to the board about what their board learned from the experience.

Make it fun – insert some humorous questions, some cartoons (Planet 501c3 is a great resource), or plan a celebration when you hit 100% participation.

