

Successful Board Self-Assessment

Why perform a board self-assessment?

Board self-assessments can help identify your board's strengths and areas in need of improvement. Considering the important role the board has within a nonprofit, improving performance is an opportunity worth exploring. **Self-assessments** can identify your board's strengths and areas in need of improvement.

Board self-assessment provides you with the opportunity to:

- look internally at the board itself
- reflect on your board members' **individual and shared responsibilities**
- identify different perceptions and opinions among board members
- determine areas of responsibility that need attention
- clarify mutual board/staff expectations
- clarify common objectives as well as check that everyone is speaking the same language, i.e. ensuring that everyone abides by a shared vision
- demonstrate accountability as a serious organizational value
- display credibility to funders and other external audiences

- use the results as a springboard for board improvement
- ensure the board is representative of the community it serves
- increase the level of **board teamwork**
- verify each member feels included, valued and engaged

Preparing for the Board Self-Assessment

Planning well is half the battle. Here are some tips to help board members prepare for the assessment and look forward to the process.

- Include periodic self-assessment as a principle policy among your bylaws clauses. It is the surest method to make the case for regular assessment.
- Task **the governance committee** (not your chief executive or the chair) to ensure that assessment takes place regularly and is well organized. This committee is the permanent structure of your board; officers and chief executives change. Also self-assessment is a board commitment; when the call for action comes from within the board, the response is different.
- Plan to conduct a self-assessment every two to three years. It is not necessary to conduct one every year — you need time to implement any potential changes and learn new ways to function as a board.
- Ensure that processes in your bylaws are respected by using your auditing firm as an outside monitor.
- Remind board members that it is not going to be an organizational assessment, but rather the focus is on the board, on its work, structure, and dynamics.

Conducting a Successful Board Self-Assessment

How the board conducts a self-assessment influences how successful it will be while securing its role as a standard process.

- Clarify the purpose of self-assessment to everyone. It is not to be judgmental or to focus only on weaknesses and negative aspects. Its purpose is to help the board