

BOARD SELF-ASSESSMENT

One of the most important responsibilities of nonprofit boards is to periodically examine how its doing through a self-assessment. Done in the proper spirit and by careful design, it gives each board member a voice and allows for sharing viewpoints. Conducting a board self- assessment educates the board on its fundamental responsibilities, highlights a board's strengths and weaknesses, and serves as a springboard for action to improve the board.

Board self-assessment is becoming more common today as the general trend towards evaluation and nonprofit accountability increases. Before starting a self-assessment process, an association should determine the purpose of the assessment.

- Is it to reinforce the roles and responsibilities of the board?
- Is it to identify areas of board strengths and weaknesses?
- Is it to help develop the agenda for board training?
- Is it to know what additional skills are needed on the board?
- Is it to prioritize board activities to accommodate a major event coming up?
- Is it to prepare for a strategic planning process?

Self-assessment will not be an easy task for everyone. A board must prepare for self-assessment. Some board members may see the project as a challenge to their wisdom or integrity. Others may see it as a "test" that needs to be passed. Fortunately many board members will readily see that self-assessment gives them an opportunity to learn more about their roles and responsibilities as board members and offers a chance to lay the groundwork for building a more cohesive governing board.

74% of Board members are very satisfied with their own understanding of the role of the board, but only 24% were very satisfied with their colleague's understanding of the role of the board.
Source: Nonprofit Governance Index 2002

IMPLEMENTING A BOARD SELF-ASSESSMENT

It is important to set a positive environment and promote a sense of team approach to a board self-assessment process.

- An anonymous questionnaire is used most often.
- Schedule adequate time for the board members to complete the questionnaire.
- If time from a regular board meeting is being used, it is best to reserve the last hour of the meeting to complete the questionnaire.

- Another option is to provide them a questionnaire to be filled out and returned at the next board meeting. A chance you risk with this approach is that the return rate may not be as great.
- The questionnaire should be anonymous and board members should know what will happen with the information once collected.
- Ensure a board member or staff is responsible for the follow-up.
- All responses should be summarized and used to assist the board in reaching a consensus of priority issues and developing a plan to address them.

The most important part of self-assessment isn't completing the questionnaire and distributing the results. It is devoting a retreat or special board meeting to discuss the results and adopt a plan for continuous improvement.

A board self-assessment generally should be done every two or three years. Self-assessment is a powerful tool for board learning and results in improved board effectiveness that in turn enhances organizational performance.

A board self-assessment tool can also address the following questions:

- How are the board members carrying out their responsibilities?
- What areas need improvement?
- What can be done to make improvement?
- Are the governing and policy documents up to date?
- Are there a sufficient number of board meetings to take care of the organization's business?
- Is the current committee structure adequate to handle the work of the board efficiently?
- Are board meetings conducted effectively?
- Do meeting agendas cover policy issues rather than administration?
- How can the value of the meetings be enhanced?
- Is there sufficient opportunity for the board to hear about minority opinions before recommendations are presented to the board for consideration?
- Is the majority to the board involving in making the board's decisions?
- Is the board supporting and evaluating the Executive Director?

There are several models of self-assessment forms that can be found at the links listed below: Sport Manitoba can also provide you with a copy of an assessment tool - "Benchmarking your Board's Performance" (YMCA of the USA) and "A Yardstick for Measuring the Board" from Manitoba Culture, Heritage and Recreation. A board self-assessment is a good practice in overall governance.

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Publication of the PSO Unit

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