**Board Self-Assessment Handouts**

These **handouts and exercises can be used with your board to consider whether it may be time to undertake a Board Self-Assessment process. You might use these handouts during a board meeting or during a board retreat.**

**Board Self-Assessment**

**When to do a Board Self-Assessment?**

* With a new board
* At the outset of a strategic plan
* After financial or executive leadership crisis
* Before major organizational expansion or fundraising
* When experiencing low energy on a board

**When Not to do a Board Self-Assessment?**

* Not in the middle of a crisis
* Not in the middle of a capital campaign or other major event (though can be done as preparation for such events)
* Not before a major problem has been solved

**Is Your Board in Need of an Assessment?**

Review the list of basic board responsibilities. Indicate whether, in your opinion, the board currently does a good job in an area or whether the board needs to improve its performance.

|  |  |  |  |
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|  | **Does Well** | **Needs Work** | **Consensus** |
| Organization's Mission |  |  |  |
| Relationship with Chief Executive |  |  |  |
| Program Evaluation |  |  |  |
| Fundraising |  |  |  |
| Financial Oversight |  |  |  |
| Strategic Planning |  |  |  |
| Selection and Orientation of Board |  |  |  |
| Board/Staff Relations |  |  |  |
| Public Relations and Advocacy |  |  |  |
| Board Operations |  |  |  |
| Board Liability and Risk Management |  |  |  |

* When a board self-assessment takes place, board members should compare their individual assessments, identify areas of consensus, and develop a plan of action for strengthening the board.

Action Planning Exercise

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| --- | --- | --- |
|  | **Ways you have ensured this characteristic is part of the board/staff partnership** | **Improvements to ensure this characteristic is part of the board/staff partnership** |
| 1. Shared understanding of the mission and vision |  |  |
| 2. Clear roles and responsibilities |  |  |
| 3. Open and honest communication |  |  |
| 4. Mutual respect |  |  |
| 5. Two-way evaluation |  |  |