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Empowering Boards. Inspiring Leadership.

Change Summary

Why is the assessment process changing?

We're enhancing the assessment experience to give organizations more flexibility, greater visibility into project progress, and faster access to the tools they need. While the survey content and reporting remain consistent, the new process streamlines administration and places more control directly in the hands of the organization administering the assessment.

What stays the same?

- The BoardSource assessment questions
- The confidentiality of participant feedback
- Assessment reports and results
- BoardSource technical support and guidance

What's new?

- Self-service assessment setup and management
- Direct control over assessment timelines
- Real-time visibility into participation levels
- A streamlined administration experience designed to support future enhancements and growth

Frequently Asked Questions (FAQ) – New Process

Will the survey questions change?

No. The survey questions, assessment methodology, and results remain the same. These enhancements focus on how assessments are administered, not the content of the assessment itself.

Will my report or results change?

Slightly. The main change is simply how the benchmarking information is delivered. Rather than appearing within your Board Self-Assessment report, benchmarking will be provided as a separate resource. You'll still receive the same valuable governance insights and reporting you've come to expect from BoardSource assessments.

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What is different about the new process?

Organizations will have sole responsibility for managing their assessment, including:

- Sharing survey link with participants
- Monitoring participation progress
- Managing survey timelines and deadlines
- Sending participant reminders

This self-service model allows organizations to work more independently and adjust more quickly.

How will participants receive the survey?

Your organization's designated project administrator will distribute the survey link directly to participants.

We recommend informing participants in advance to watch for the survey invitation and check their spam or junk folder if they do not see it in their inbox.

Can BoardSource tell me who has and hasn't responded?

No. The enhanced process is designed to support participant anonymity and data privacy. Neither BoardSource nor your organization will have access to individual respondent tracking.

You can use your project dashboard to view how many responses overall have been collected.

Can participants change their responses after submitting the survey?

No. Once a survey has been submitted, responses cannot be edited or reopened.

We encourage participants to review their answers carefully before submitting to ensure their feedback is complete and accurate.

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Can I extend my survey deadline?
Yes. The enhanced process is designed to give organizations more control over their assessment timeline.

We highly recommend monitoring participation regularly and reviewing your survey's close date before the deadline arrives to determine whether additional time is needed.

What happens if I forget to extend the survey before it closes?
Because organizations manage their own timelines, it is important to monitor participation and closure dates throughout the assessment period.

As a best practice, we recommend setting up a calendar reminder several days before your survey is scheduled to close, so you can evaluate participation and make any necessary adjustments.

Will BoardSource still provide support?
Absolutely. While organizations will have greater control over administering their assessments, the BoardSource team remains available to answer questions, provide guidance, and support a successful assessment experience.

What are the benefits of the new process?
The enhanced experience offers:

- Greater control over assessment administration
- Increased flexibility in managing project timelines
- Faster adjustments without waiting for manual updates
- Stronger participant privacy protections
- Improved scalability to support future enhancements
- The same trusted BoardSource assessment content and reporting experience

Key Takeaway

What's changing is the process. What's staying the same is the quality, confidentiality, and value of the BoardSource assessment experience. You'll have more control over your project while continuing to receive the insights needed to strengthen your board's effectiveness.

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Contact & Support

We're here to help ensure your assessment experience is successful.

Before Contacting Support

To help us assist you as quickly as possible, please have the following information available:

- Organization name
- Assessment type
- Current survey launch and closure dates
- Description of the issue or question

Common Questions We Can Help With

- Understanding the assessment process
- Administration tips and tricks
- Report and results questions
- General troubleshooting

We're committed to making the transition as smooth as possible and are here to support you every step of the way.

For assistance, please contact the BoardSource Assessment Team at assessments@boardsource.org.