

***“On a Scale of 1 to 10 – How Would You Rate Your Board?”***

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**Does this sound like you?**

- Our board isn't engaged – half of them don't return phone calls or attend meetings.
- Sometimes I think our board members can't read! We work so hard to give them everything we think they will need to make good decisions, but so many of them act like they don't know what's going on.
- I wish my board chair knew the difference between my job and hers! She micromanages and second guesses everything I do, leaving me feel like I don't know what I'm doing.
- Our board meetings are so boring. I can't believe our board members can stand sitting for two hours listening to reports.
- We don't have 100% participation in giving from our board members.

If any of these sound familiar, you're in good company. CEOs and fundraisers often find themselves caught in a never-ending loop of lackluster board performance, feeling like they have no control over what they do.

**What if we looked at them differently?**

Once a year, if good human resources practices are working in our organization, we sit down with our staff or our bosses and do the annual performance evaluation. Most of the time, our compensation is dependent on how well we meet our goals so we work harder to meet those goals.

What if we instituted an evaluation process for our unpaid staff as well? Beginning with the board and moving all the way down to our front line volunteers, we could have that annual conversation with them to compare our perspectives on how things are going. We can set achievable goals for the next year and get to know what is working and what isn't for them as a group, and as individuals. And maybe, after a few years of consistent evaluation, board members and volunteers will have a better understanding of their role in the organization, and nonprofit managers will have a better understanding of what our board members and volunteers need from us.

**So how do we get started?**

There are simple approaches that work well and are easy to administer through survey forms (although collecting them all can be challenging). One form asks questions about overall full board functioning. Another form asks questions that

the individual member would use to review their own performance and commitment. Some organizations even use a third form for the governance committee to use to assess individual board members' performance as part of their recruiting, training, and retention efforts.

**Questions for a full board evaluation include:**

- Understanding of the mission and purpose of the organization
  - Do board meetings include references to the mission?
  - Do board members view decisions through a vision/mission lens?
  - Is the mission statement easy to use in conversation with others
- Governance and policies
  - Are board members aware of and understand the organization's policies?
  - Has each board member signed an annual conflict of interest disclosure form?
  - Does the board measure its' performance against objectives regularly?
  - Is the board actively engaged in its own health and wellbeing?
- Board organization
  - Are committees structured logically to address strategic action around the organization's operation?
  - Do the board and committees have adequate agendas and minutes for each meeting?
  - Do the board and committees address issues of substance?
- Meetings
  - Are meetings appropriately timed and frequent enough to ensure effective governance?
  - Do members actively participate in strategic discussion, or are meetings simply report-out gatherings?
- Board membership
  - Does the board have the right range of talents and skills?
  - Are board members' skills and talents used effectively?
  - Is the board diverse and include a voice for those people you serve?
- Staff support
  - Is communication from staff appropriate for the work that needs to be done?
  - Does staff provide adequate support before, during, and after meetings?
  - Are meeting materials provided in advance of the meeting, allowing for adequate time for board members to review?
- Activity
  - Do standing committees meet regularly and report to the board?
  - Does the board follow its own policies?
  - Are board meetings well attended?

- Does each board member have a committee assignment?

There are dozens of other questions that can be added to this evaluation – but they should be chosen to ensure that the questions included are the ones that the organization values most or are having the most difficulty with.

**Questions for individual members include:**

- Contribution to the mission
  - Attendance
  - Financial support
  - Committee work
  - Fundraising
- Level of commitment
  - Is your financial support personally significant to you?
  - What is keeping you from greater participation (time, talent or treasure)?
- Board development
  - Has our organization helped you to grow through training or assignments? How?
  - What do you need from us to help you be a better board member?
  - What would you like to see in the way of training for yourself or the board in general?
- Board activity
  - What changes would you make to our board meetings (timing, agenda, materials, etc.)?
  - How well is your committee assignment working for you?

As with the full board evaluation survey, questions should be tailored to the areas that you feel need to be addressed with board members or to areas that are critical to your organization's values.

**Third party evaluation of individual members**

Using a scale of 1 (needs improvement) to 5 (excellent), questions about leadership include character and personal integrity, expertise, and personal commitment. Interpersonal skills are great to add, and questions on how well someone contributes through strategic thinking are very important. Finally, contributions to the board's and committees' knowledge and wisdom are excellent topics.

Using a third party evaluation in conjunction with a board skills matrix is an effective tool for the board development or governance committee as they discuss current and future board members.

**Everyone is a winner!**

It's important to share the overall board performance survey results with the whole board at a board meeting and solicit feedback for improvement. Not only will they understand that their performance is a critical part of the organization's success, but the conversation will add value and contribute to a more goal-oriented and performance-driven team. This process can be successfully adapted for every level of volunteer as long as the staff facilitating the surveys is properly trained in performance evaluation best practices. Institutionalized from top to bottom, assessment and evaluation is a winning combination to improve your organization's effectiveness.