

---

# HOW WELL IS YOUR BOARD FUNCTIONING?

*A Simple Board Assessment*



In a thriving nonprofit, board chairs and staff leaders act as co-pilots in their nonprofit “twin engine jet.” It’s critical that both engines – your board and your staff – function well.

Here’s an assessment tool you can use to find out how your board engine is doing. Your board chair and staff leader can use this tool together at your next board meeting or at a retreat where you are taking stock of how the organization is doing. You’ll quickly and specifically learn where there is room for improvement.

Please answer the questions by marking each one on a scale of 1 to 5:

**1** = I STRONGLY disagree

**2** = I disagree

**3** = Sometimes yes / sometimes no

**4** = I agree

**5** = I STRONGLY agree

---

## Ground Rules:

1. The assessment should be done anonymously.
2. Responses should be collated by one of the officers of the board.
3. Each question is independent and should not be averaged. For each question, you want to look at the number of 1s and 2s as a single value and the number of 4s and 5s as another value.

- 
1. If an observer joined the board meeting, she’d know exactly whose meeting it was (the chair’s).
  2. Little of our time is spent talking about things that have already happened.
  3. Staff reports and presentations engage us, offering opportunities to ask questions and offer insights.
  4. When we approve the budget, I feel informed and know why I am voting yes.
  5. I feel my voice matters when I raise a question or concern.
  6. The board meeting agenda is well designed so we are talking about things that really matter.
  7. I receive all the board meeting materials at least 1 week ahead of time.

8. The pre-meeting materials are not overwhelming. They are written not to impress me but to inform and enrich me, and I read them all thoroughly so I am prepared for the meeting.
9. Sometimes we talk about big problems the organization has.
10. The board feels comfortable asking the Executive Director difficult questions about strategy and impact.
11. I have a clear and tangible understanding of the impact of our work.
12. The meetings are well-designed, well-managed, and engage me in such a way that I feel bad if I miss them.
13. I leave board meetings feeling informed and inspired to be a vocal ambassador for the work. I know what to say and am enthusiastic about spreading the good word.
14. I never feel that we rubber stamp decisions that the staff puts in front of us.
15. We conduct a formal review of our Executive Director annually.
16. The staff communicates with us about accomplishments, stories we can tell, and offers us various ways to be of help to the organization. I don't feel nagged to sell tickets, attend events, or be more diligent about fundraising.
17. I can clearly articulate the 5 - 7 key annual goals for the organization and how they fit into the overall plan.
18. When our board engages in strategic planning, it is done so with deep involvement of key board members.
19. I have been well trained about all the different ways in which I can meet my fundraising obligation.
20. The Executive Director has a good sense of who I am, what I bring to the board, and I meet or talk with her/him outside of board meetings.
21. Our board has effective committees and each committee has a charge and a set of annual goals.
22. I would never consider checking email during a committee phone call.

23. I understand what my role as a board member is and I am held accountable by the chair to fulfill that responsibility.
24. Our board chair knows Robert's Rules of Orders and manages board votes and discussions effectively using them.
25. I feel that all of what I bring to board service (my experience, my enthusiasm, my professional skills and my insights) add real value to the strategy and impact of this organization.

## How to Interpret the Results

This is no time for blaming or shaming. This is a time to celebrate your 4s and 5s and really dig deep into your 1s and 2s.

One of the single best uses of two hours of time would be a thoughtful conversation about what you are doing well (4s and 5s) and WHY. Conversely, what could be stronger (your 1s and 2s)?

Have a really introspective look and answer these simple questions:

- *What could I as a board member do to help bring this up to at least a 4?*
- *What could we as a board do to bring this up to at least a 4?*
- *What could I as an Executive Director do to bring this up to at least a 4?*

Have somebody grab a marker and flip chart and list the very specific actions that are recommended and around which there is consensus. Get the list transcribed. Make sure it's front and center with the ED and the Board Chair as they meet every week or two, and as they begin to design the elements of each board meeting.

If the list finds its way into the darkness of a desk drawer, you can expect more 1s and 2s the next time you take this assessment.

BUT! If the list is a living, breathing document that the group reviews, your board will absolutely become more effective.

*Joan*