

## Board Self-Assessment

from Scott Heyman, Workshop Series Coordinator  
Human Services Coalition of Tompkins County  
Center Ithaca, 171 E State/MLK Jr St  
Ithaca, NY 14850  
607-273-8686 ext. 235  
sheyman@hsctc.org

In the space provided rate each of the following statements according to how well you think the board of directors as a whole is doing.

“1” is the lowest rating, “4” is the highest.

You may administer this survey yourself or the Coalition will administer it for you – call 607-273-8686 and ask for either Scott or Tamara.

1. We are successful at cultivating, recruiting, orienting, and keeping skilled, diverse members.

1 2 3 4

2. Our board monitors attendance and activity and follows through on absent or inactive members.

1 2 3 4

3. Members willingly accept leadership roles on the board and a plan and procedures exist to assure smooth leadership transitions.

1 2 3 4

4. Our expectations of our members are high and every member hears this before they decide to join.

1 2 3 4

5. The board assesses the performance of itself as a whole as well as of individual board members and uses guidelines to remove those who fail to meet minimum expectations.

1 2 3 4

6. Our meetings are engaging, all are encouraged to participate, disagreement is welcomed, relationships are collegial, and decision making is consensual.

1 2 3 4

7. We examine all sides of issues and engage effectively in problem solving.

1 2 3 4

8. We have an organized, active program to improve the education and understanding of board members about all aspects of our agency and of our job as board members.

1 2 3 4

9. The board periodically re-evaluates and re-states the organization's mission, vision, and values.

1 2 3 4

10. The board takes a leadership role in the development of the agency's plans for the future.

1 2 3 4

11. Our decision making is guided by a shared understanding of our agency's mission, culture, and values.

1 2 3 4

12. There are written policies that make it clear what the board is supposed to do and what the chief executive and the staff are supposed to do.

1 2 3 4

13. Our partnership with the chief executive is mutually supportive. We make her more effective and she makes us more effective.

1 2 3 4

14. We are good strategic thinkers. We focus most of our attention on issues and priorities that are vital to enhancing the organization's future.

1 2 3 4

15. We take the necessary steps to build and maintain good relationships with all organization stakeholders, especially donors.

1 2 3 4

16. We do a good job of assessing the agency's fiscal position and of taking appropriate steps to ensure that it is sound.

1 2 3 4

17. We ensure that appropriate financial control and oversight procedures are in place.

1 2 3 4

18. We do a good job of determining which services our agency should provide, based on our internal capacity and the community's needs.

1 2 3 4

19. We do a good job of assessing the effectiveness of the agency's programs and of making needed changes.

1 2 3 4

20. Every member commits money and time to the agency's fundraising goals.

1 2 3 4

21. The board individually and collectively advocates for the organization and its issues; we are good at telling our "story."

1 2 3 4

22. We recognize our own members and members of the staff on special accomplishments and occasions, and we organize social events for ourselves that sometimes include staff.

1 2 3 4

If you decide to ask the Coalition to administer this survey to your board members, Survey Monkey will automatically compile the results and the Coalition will send the results to the person or people you designate. When you receive these results the Coalition suggests that you not automatically focus your improvement efforts on items that scored lowest.

Have a discussion about the importance of all the items – an item that scored near the bottom may not deserve special attention if its importance is not high enough. Conversely, an item that was rated high may still deserve extra attention because of its high level of importance.

When you have determined which items deserve to be the focus of your improvement efforts assign a committee or special team the responsibility to come up with an improvement plan, and make this plan a component of the board's work plan.