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## Assessing the Board's Performance

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Board Briefs are a series of "at-a-glance" resources to assist board volunteers in supporting their Clubs. They are designed for use at board meetings as subject matter for a five-minute educational opportunity. They can be discussed in their entirety or in sections. Different questions from the same brief can be posed at different meetings. The CVO can use them or ask an appropriate committee to lead the conversation (e.g., finance, governance, etc.).

### **Executive Summary**

Every two or three years, the board should reflect on how well it meets its responsibilities. Engaging in a structured board assessment gives the board a chance to reflect on the quality of its work and to consider ways in which to strengthen how it operates. In addition to having the full board assess its performance, individual board members can also benefit from taking stock of their own performance as members of the board by completing an annual individual board member assessment.

### **Board Assessment**

The board should step back from its usual work and reflect on how well the board meets its responsibilities every two or three years. Conducting an assessment allows the board:

- To refresh board members' understanding of the board's roles and responsibilities, individual board member responsibilities, and how to operate as an effective board
- To identify gaps between expected and actual performance and important areas of board operation that need attention/improvement
- To provide a context for discussing problems and developing plans for improvements
- To build trust, respect, and communication among board members and with the chief professional officer (CPO)
- To model accountability for staff
- To gain credibility for the Club among donors and other constituencies

Boys & Girls Clubs of America (BGCA) has a number of simple and free tools that your board can use including the Board Assessment Survey and Criteria for Evaluating a Board of Directors. A number of other organizations also offer board assessment tools including BoardSource and McKinsey, among others.

A formal board assessment involves the following general steps:

1. Board decides to assess its performance.
2. Assessment process is established.
3. Board members complete and return questionnaires.
4. Responses are compiled and analyzed.
5. Results are discussed and an action plan is developed.
6. Follow-through and follow-up.

To get maximum benefit from its assessment, many boards have a skilled person who is not a member of the Club facilitate the discussion and action planning. After that, it is the

responsibility of board leaders to ensure that the board follows through with the actions that were identified.

### **Individual Board Member Assessment**

Conducting individual board member assessments can be valuable. Conducting an individual board member assessment annually reminds individual board members of their responsibilities and gives them a chance to consider ways in which to be a more effective board member or even whether continued service on the board is the most effective way to support the Club and its mission.

Individual board member evaluations can be a simple self-reflection exercise or they can incorporate peer feedback. Peer feedback, when carefully collected and used, can be a powerful reminder of the fact that board members are mutually accountable for the welfare of the Club. Boards that use peer-assessments need to have a written and approved process for how collect and use the feedback and to ensure that it is implemented fairly and equitably.

The Governance Committee can lead the individual board member assessment process – developing the process and distributing the evaluations. They can also determine the best time of year to conduct these assessments if the board decides to undertake this annually. Toward the end of the year and prior to collecting nominations for elections to the board is generally an appropriate time.

Individual board member assessments are available in the BGCA board volunteer training.

### **Questions for Discussion:**

The following questions can be used for discussion at board meetings:

- When did we last conduct a board assessment? What worked well? What did we learn? Have we addressed areas requiring improvement as identified by the assessment? If not, what do we need to address?
- When should we conduct our next board assessment?
- Does our board currently conduct individual board member assessments? If yes, how effective are they? Could we improve the process? If not, what benefits would individual board member assessments offer the board?

### **Additional Resources**

- Boys & Girls Clubs of America, Board Volunteer Training.
- Boys & Girls Clubs of America, Chief Volunteer Officer (CVO) Guide.

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