

Assess, Reflect, Improve: Becoming the Board Your Organization Needs

March 7, 2025



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Agenda

Why Assess Board Performance

What to Expect from a Board Assessment

When and How to Do a Board Assessment

Choosing a Board Assessment Tool

Ask Me Anything



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Nonprofit is a tax status, not a business model.



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What Nonprofit Boards Do



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Why Assess Board Performance?



Systematically check the organization's vital signs

- Identify strengths & gaps
- Align with mission & strategy
- Foster accountability & transparency



Improve board culture & dynamics

- Increase individual board member satisfaction
- Energize and retain board members
- Increase performance of board in supporting organization



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The Link Between a Board Assessment & Board Culture

How the board governs reflects its culture

Assessments uncover:

- Communication patterns
- Decision-making processes
- Inclusivity & trust levels

Assessments = Conversation starters



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What Results from a Board Assessment Process?



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What a Board Assessment is NOT



A box to check or a quick fix



A *To Do* item for the chief executive



An assessment of the organization's chief executive, staff, programs, or operations



Simply an interesting activity to fill time at a board retreat



A tool to solve a problem with that one difficult board member



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When to Do a Board Self-Assessment

Staff and board leadership are committed to strengthening the board

A board or staff leadership transition

Funders are supportive of capacity-building

There is room for improvement in board engagement

Before strategic planning

Every 2-3 years



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When NOT to do a board self-assessment



The organization is facing a crisis or other pressing matter requiring the board's attention



The staff and board are at odds



The board lacks governance leadership to lead the self-assessment and/or enact the resulting development agenda



You're not willing to put in the time



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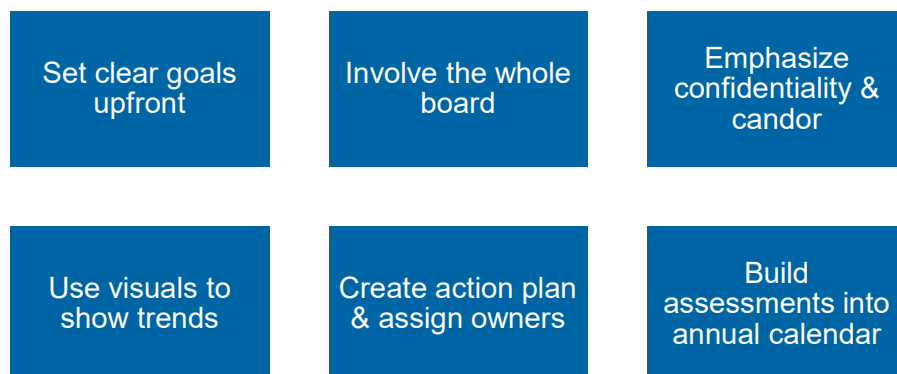
The Board Assessment Process

- ✓ Get buy-in from board leadership
- ✓ Assemble the assessment committee/subcommittee
- ✓ Introduce the assessment & process to the full board
- ✓ Capture individual reflections
- ✓ Present & discuss results
- ✓ Create a development plan
- ✓ Enact the plan



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Tips for Success



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The Assessment is Done, Now What? Going from Data to Dialogue



**Share results
transparently**



**Focus on patterns, not
individuals**



Use results to:

Discuss roles &
expectations
Address board/staff
dynamics
Build culture of
accountability



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Choosing a Board Assessment Tool



Off-the-shelf or
Custom



Paper or Digital



Anonymous or
Attributed



Internal or
Benchmarked



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DIY or Facilitated?

DIY

+Pros

- + Cost-effective
- + Flexible
- + Board ownership

- Cons

- Bias risk
- Less candor
- Limited expertise

Facilitated

+Pros

- + Neutral perspective
- + Best practice insights
- + Adds credibility

- Cons

- Cost
- Scheduling
- May feel formal



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- Anonymous Online Tool
- Results Dashboard, Reports, Findings, Interpretation, Benchmarking
- 30-day Free Trial or Annual Subscription
- Open Textbook: *Guidelines for Improving the Effectiveness*
 - Understanding the symptoms
 - Diagnosis
 - Treatment



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BoardSource Board Self-Assessment

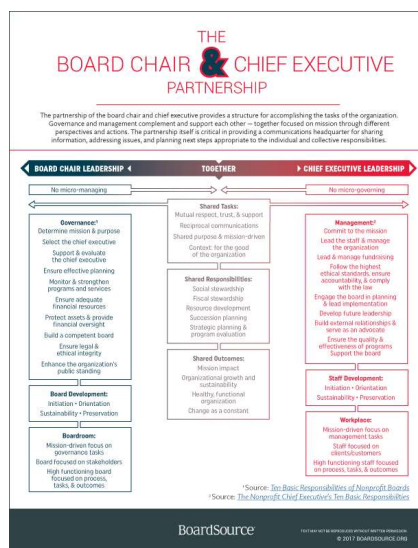
- Anonymous Online Tool
- Data Report & Benchmarking
- Board Support Membership or One-Time BSA Purchase



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Board/Executive Partnership



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Resources

- [BoardCheckup.com](https://boardcheckup.com)
- [BoardSource Resources for Nonprofit Boards](#)
 - [Board Self-Assessment](#)
 - [Board Chair & Chief Executive Partnership](#)
- [National Council of Nonprofits](#)
- [Board Governance Tools & Best Practices \(501Commons\)](#)



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Ask Me Anything

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