

## Board Assessment: How Are We Doing?

by Suzanne M. Kearney, Executive Director

**B**oards of high-performing organizations are self-aware and committed to continuous improvement. Self-awareness means that these boards periodically take a hard look at their own performance, identify opportunities for improvement, and change practices or leaders to ensure they make progress. A very effective way to strengthen a board's performance as a governing body is to assess annually how well it is functioning.

### How Do Boards Make It Happen?

It is not difficult for us to recognize the value of regular assessment for improvement. It is challenging, however, to make it happen in an orderly and consistent way. The best way to do this is to make it part of the annual agenda of the Board, just like approval of the annual budget is done every year at the same time. This approach builds self-assessment into the "habit" of the Board.

Once you have determined that it will occur annually at the June Board meeting, for example, then the Board needs to establish an assessment cycle that works as follows.

The Board determines the length of its assessment cycle, e.g., five years. Generally, in a five-year cycle, the first four years are self-assessments. Ideally, someone from outside the ministry receives the completed forms, collates the results of the self-assessments, and writes a report summarizing overall ratings.

The first year's assessment is general in content, concluding with an opportunity to identify strengths of the Board and areas that need improvement. The following (and each successive) year's assessment pursues an in-depth evaluation of the highest rated areas for improvement.

The last assessment in the cycle (e.g., year five) is comprehensive. It is frequently conducted by an outside party, includes individual and group interviews, and culminates in a board retreat where feedback is presented and a future chart is fashioned.

By building this assessment cycle into your Board annual calendar you have created an organizational habit that will pay dividends for years to come.

### Why Do Boards Engage In Assessment?

A board assessment provides members the opportunity to:

- Heighten awareness of the role and responsibilities of the board;

- Highlight areas in which the board excels;
- Identify important areas for improvement;
- Chart a course of action to achieve the needed improvement;
- Alert the board to the need for restructuring the way the board is organized to do its work; and
- Build trust and a sense of team among board members.

Both the assessment process and the outcomes can greatly enhance performance improvement. The assessment can identify differing opinions and perceptions among board members, getting festering issues out in the public forum where they can be addressed in a non-threatening and productive way. The assessment can surface expectations that board members have of staff that require clarification lest they become a source of conflict. Likewise concerns about presence, participation and leadership can emerge that, left unaddressed, can weaken a board, permit "dead wood" to remain, and ultimately lead to divisions and frustration. Well-crafted assessment tools can bring light to these dark sides of board functioning.

Board members who contribute a great deal of time, energy and expertise to the work of the Board, deserve to know how they are doing overall. They should have a satisfying, even rewarding, experience serving on the boards of our sponsored ministries. No one really enjoys being part of an underperforming group.

### Who Should Ensure that an Assessment Is Done?

At our sponsored ministries, the Governance Committee (aka Nominating Committee or Committee on Trustees) of the Board takes responsibility for assessing the Board's performance. In addition to its role in recruiting, orienting and evaluating individual Board members, the Governance Committee assesses the Board's performance by formally seeking feedback from Board members and senior management, usually through a questionnaire. No ministry-related subject is taboo in this questionnaire. Typically topics range from the effectiveness of management of meetings and committee and Board leadership to Board participation in fundraising and relations with key staff members.

The Governance Committee sees to it that (1) the assessment cycle gets on the Board's agenda, (2) an instrument suited to the specific needs for improvement of the Board is developed, (3) an outside party analyzes and

reports the results, and (4) secures someone to conduct the comprehensive assessment at the conclusion of the cycle.

#### **What Are Obstacles to Regular Assessment?**

Many boards fall into ruts that inhibit interaction, limit creativity and reduce productivity. We can fail to recognize the ways in which we compromise our effectiveness and dissipate the goodwill of our members, unless we step back and reflect on our interactions. Frequently old ways can persist long beyond their usefulness, because we don't ask why "we do things this way." Assessment may be seen as an expensive and time-consuming process, whereas experience shows that a little effort can reveal a lot of information about the quality of the Board.

#### **Conclusion**

It is our fiduciary responsibility as Board members, for which we are accountable, to operate in a highly effective fashion for the good of the ministry with which we have been entrusted. Boosting board performance has enormous benefits – for Board members, staff, volunteers, those whom the ministry serves, and the larger community.

#### **Tips for Best Results**

- Ensure all Board members know why and how the assessment is being done.
- Protect the confidentiality of participants.
- Set a tone where self-criticism is an obligation and is seen as constructive.
- Define the timeline with a planned notification system (e.g., email messages) to increase assessment form completion.
- Engage someone outside the ministry to write the evaluative report.
- Make assessment results a focus for board development throughout the year.
- Conduct mini-assessments at the conclusion of each Board meeting to gather members' perceptions about appropriateness of the topics addressed and management of the agenda