

BOARD EVALUATION QUESTIONNAIRE

How well does your Board measure up?

Following is a quick and easy questionnaire to help identify areas of strength and weakness of your board. You can use this questionnaire to evaluate the health and effective functioning of your board.

Answering the questions on the chart will provide you with a total score and guidance on next steps.

Your board will be in a position to change when it is able to make decisions based upon evidence and data. This questionnaire provides that information. The board is able to change when it can see for itself what work needs to be done; rather than being told by the Director or CEO about how it should change.

There is no one best way for a nonprofit board to function, more a set of best practices. If your board does not operate strictly in accordance with this questionnaire, that does not mean it is dysfunctional. Nevertheless, having the board members work together to agree upon a response to each question can be an effective way of highlighting ways for improvement.

How to complete this survey.

Either bring the board together as a group or provide each member with a copy of the survey. If working as a group, allow a couple of hours for the board members to read through the survey, discuss each question and agree on a collective score for each question. It may even help to engage an external facilitator for this meeting.

If seeking individual responses, allow plenty of days for each person to receive, read and respond and then allow time for someone to collate the responses and create a collective score by indicating either the average score or the mean score for each question. An alternative is to display the range of responses along a scale.

Remember your board members are volunteers. Their time is valuable. Change takes time, therefore allow plenty of time.

Conducting and/or facilitating this questionnaire is the role and responsibility of either the Chairperson/President or other board member. It is not the role of the Director or CEO.

You are not aiming for perfection; rather the implementation of best practices and effective governance. Likewise you are not betting on a sheep station so don't take yourselves too seriously. Keep the conversation cordial and exploratory, rather than accusatory.

The Questionnaire

How does your board rank on the following scale?

0 = No, this doesn't exist on our board

1 = We're working on it

2 = Yes, we do this well.

SELECTION AND COMPOSITION	RATING
1: The board is composed of person vitally interested in the work of the organization.	
2: The board is representative of its constituency with regard to race, class, gender and sexual orientation	
3: There is a balance of new and experienced board members to guarantee both continuity and new thinking	
4: Board members have the combination of skills, (fundraising, management, legal, financial, marketing etc) necessary to do their work	
5: There is a limit to the number of consecutive terms a board member can serve (no life terms)	
6: The organization has a pool of potential board members identified for the future	
7: The organization develops future board members through the use of volunteers on sub committees	
8: New board members are recruited and selected using a thorough review process	
ORIENTATION AND TRAINING	RATING
1: There is a statement of agreement outlining the responsibilities of board members that all board members sign	
2: The board understands its legal liability	
3: The organization provides an orientation for new board members	
4: The organization supplies a board manual to all board members that includes, but is not limited to, descriptions of current programs, a list of board members, budget and funding information, bylaws, and personal policies	
5: The organization makes training opportunities available for board members to increase skills related to their board responsibilities	
STRUCTURE AND ORGANISATION OF BOARD	RATING
1: The board has a Constitution or Rules that describe the duties of board members and officers, and the procedures by which the board conducts its business	
2: The board has a mechanism (such as an executive committee) for handling matters that must be addressed between meetings	
3: The board elects a chairperson, or co-chairs, to provide leadership and coordinate the ongoing work of the board and its committees	
4: The board has active committees (finance, special interests, service delivery, risk, planning etc) with specific responsibilities	
5: Committee assignments are reviewed and evaluated periodically	
6: Working relations between the board chairperson(s) and the Director or CEO are positive and productive	
7: Board and staff members are clear as to their specific roles and responsibilities	
8: Relations between staff and board members are characterized by mutual respect and good rapport	

THE BOARD AT WORK	RATING
1: There are regular scheduled board meetings at least 4 times a year	
2: Meetings begin and end on time and run to an agenda	
3: There is adequate preparation and distribution of material, including agendas, study documents, in advance of board meetings	
4: Board meetings are characterized by open discussion, general participation, and active thinking together	
5: Board members deal primarily with strategic matters of direction, financial management, risk assessment, compliance and reporting, future planning, governance, board performance and support for the Director or CEO	
6: Minutes of board and committee meetings are written and circulated	
7: Committees are active and complete assigned tasks in a timely manner	
8: The board is aware of matters of community, state and national importance within the organisation's field of service	
9: Individual board members accept and carry out assignments with the areas of their talent and expertise	
10: Board members follow through on their commitments in a timely manner	
11: The Board conducts regular reviews of its own organization and work	
12: New leadership is emerging constantly from the board and its committees	

Add up your score.

If your score is –

54-64: You're in great shape. You have a healthy board with good working relationships. You should consider sharing some of your experiences with other not for profit organisations.

42-53: You're on the way to a strong, effective board; have a collective look at your few weak spots and work together to improve upon those.

24-41: You have lots of room for improvement. The board needs to prioritise areas to work on – both in the short term and the long term, make a plan and possibly seek some help.

Under 23: You probably already know you are experiencing problems. Now that you have some data to inform your change process it is recommended you call John Coxon on 0427 390 376 (Aust) or 0210 541 464 (NZ) to arrange a meeting with the board and for assistance with guiding improvements.