



Board Self-Evaluation Questionnaire

A Tool for Improving the Governance Practices
of Non-Profit Organizations

❖ User Guidelines ❖

Board Self-Evaluation Questionnaire

Guidelines on How Best to Use This Tool

- This tool is designed to be used as an annual board evaluation. It seeks to help a board answer the question: *what are we as a board now doing well and what can we do better?*
- The tool is designed for organizations large enough to employ staff, those with someone in an executive director or CEO role. The concept though, and many of the questions too, may also be of value to all volunteer organizations.
- Section D on the **Performance of Individual Directors** provides an opportunity for board members to personally reflect on their own performance. This portion of the questionnaire, once completed, should be retained by each board member, although board members may feel comfortable sharing their overall rating for this section at the bottom of the page or what one of the criteria identified they most want to improve upon
- Section E seeks to provide **Feedback to the Chair of the Board**. This page, once completed may be separated from the others, collected, and then passed to the chair. This section is optional; the chair may wish to conduct a separate process for soliciting advice and feedback at another time.
- The rating scale at the bottom of each page (“My Overall Rating”) asks that board members add up the total of the numbers circled on the page. This number is intended as a rough interpretation of the results of each section. The range of numbers will change with the number of questions asked and answered in the section. The ratings scale could easily be with removed to make space for a question that solicits a narrative comment.
- **We would encourage boards to use this as a source of ideas to inform the development of their own board self-evaluation tool.** Your board can complete this assessment as an “experiment” and then develop a customized version based this experience.
- **Remember that this tool is best used to stimulate reflection and discussion; it is not a scientific survey instrument** that has been tested on a large number of boards and for which there are average results.
- Boards might well consider bringing in an **independent person** (a post-secondary management studies student perhaps) to conduct the evaluation and compile, summarize and report on the results. This will insure that individual responses are kept confidential and may result in more honest answers. If you choose to do this then completed copies of Section D could be passed on for that person to compile.
- Ask that board members complete the questionnaire at home before bringing it to a meeting. The space for a board member’s name on the front cover is meant for

distributing the questionnaire rather than for collecting it and compiling the results. Directors may want to hand back only Sections A, B, C and E.

- Consider evaluating other things such as the effectiveness of committees or board “follow-through”. Avoid questions that compare individual board member performance; keep the focus on the whole board.
- If your board relies on an **Executive Committee** that meets between board meetings, a separate section might be needed to assess its relationship to the board (to be answered by everyone), its relationship to the Executive Director and the conduct of Executive Committee meetings. Questions for such a section could be drawn from the other sections.
- Section C on the **Board’s Relationship with the Executive Director** is **not** intended as an evaluation of the Executive Director but rather an evaluation of the quality of the board’s relationship with the Executive Director as judged both by the board and by the Executive Director. **The items evaluated here should focus on matters that the board can change about its own performance.**
- The evaluation includes a question or two (see Sections A and B) intended to increase the board’s awareness of, and interaction with external stakeholders. A stakeholder analysis exercise is one boards should undertake on a regular basis. There are lots of tools online to help design one.
- Board evaluation can be done at any time of the year and should be put on the board’s annual agenda. It may be best not to schedule it at the same time of the year that the board is conducting an evaluation of the Executive Director or preparing for the AGM.

I originally developed this resource for non-profit outreach purposes as a faculty member in the College of Continuing Education at Dalhousie University in Halifax, Nova Scotia, Canada. Earlier versions of it are scattered around the web. There are many board self-assessment or evaluation tools available online, some less detailed than this one, which organizations may prefer. If you are adapting this for your own organization’s use I would appreciate a footnoted credit. I would also welcome receiving any feedback. Send comments to e.grant.macdonald@gmail.com. Thanks.

If you are a Twitter user and interested in non-profit organization leadership you may want to checkout my Twitter feed @governinggood