



Board Self-Evaluation Questionnaire

A Tool for Improving Governance Practice
For Voluntary and Community Organizations

❖ Guidelines ❖

Non-Profit Sector Leadership Program
College of Continuing Education

VERSION II

 **DALHOUSIE
UNIVERSITY**
Inspiring Minds

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 be 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 and many of the questions may also be of value to totally volunteer-run 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 issues identified they most want to improve upon
- This version (Version II) includes a new but optional section, Section E, that seeks to provide feedback to the Chair of the board.
- 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.
- 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 should consider bringing in an **independent person** 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** which meets between full 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 performance.
- 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.

These guidelines are for Version II of this questionnaire. Version I was tested by several organizations and suggestions for improvements from this exercise have been incorporated here. If you are adapting this for your own use we would appreciate crediting us as a resource. We would also welcome receiving your feedback and/or a copy of your own version.

NPSLP