

Why is Board Self-Assessment So Important?

Education – It is critical for boards to regularly review and discuss their roles and responsibilities. An assessment creates an opportunity to move from textbook theory to application. It is easy to get caught up in one or two roles and lose perspective on the bigger picture.

Engagement – An assessment requests input from all board members and then engages the full board in discussing the results and defining actions to be taken.

Reflection, Evaluation, and Perception – Ah... the unexamined life. Do we all view our work the same way? How are we doing? Step back from the routine reports and activities to explore how we can work smarter and leverage our efforts in support of our mission.

Prioritization – What should we be focusing on? Beware of assessment tools that merely ask you to rate everything and then produce a long list of problem areas. You need to know where you are already strong, what areas are most important in the next few years, and which areas are worth investing your scarce time and resources.

The www.CharitableAdvisors.com assessment is adapted from a framework developed and placed in the public domain by the international consulting firm McKinsey & Company that identifies nine critical roles of the board.





What other people are saying about our Board Self-Assessment?

**Kimberly Donahue, Director Nonprofit Training Center
United Way of Central Indiana**

"I chose this tool to use in Capacity Building with all our organizations because of the way it synthesizes the McKinsey & Co. framework into less than 50 questions. I consulted with one of our member agency board's last night and they really liked having the PowerPoint™ presentation provided "ready to go". This particular board is quite new and they were able to fill out the comments sections - a great way to bring up things that they wouldn't normally have mentioned. The turnaround was amazing; very immediate for them to make a difference now. Very affordable. At this cost, it is easy for us to offer to many of our agencies."

**Brent Cardin, Executive Director
Arc Rehab Services**

"I found the Charitable Advisors On-line Board Assessment to be very helpful. The best part for me was the preparation of the PowerPoint which I found useful when presenting to the whole board. CARF, the Commission on Accreditation of Rehabilitative Facilities, requires board assessments. I found this to be of great help as a part of that accreditation requirement."

More about Board Self-Assessment from AllAboutBoards.com

Short, Low Cost, Defines Priorities – in a “ready to present” PowerPoint Summary

Developed from our years of consulting experience, the assessment is less than 50 questions, includes questions about the commitment of individual board members, and assists in defining priorities, not merely identifying weaknesses. We also map the Executive Director's responses for comparison to the Board. Our staff liaison is in communication with you as we set up and run the survey and deliver the results to you for use with your board. Typical turnaround from start to finish is about three weeks.

The www.CharitableAdvisors.com Board On-line Self-Assessment Tool is priced at only \$325 for boards up to 20 members (\$375 for more than 20) and includes both a PowerPoint™ summary report for Board presentation and discussion and a detail report of survey responses. Compare our pricing and reports to: www.BoardSource.org



TO GET STARTED: Purchase the Assessment on-line or e-mail
Bryan@CharitableAdvisors.com

DISCLAIMER: Please keep in mind that we are serving as a conduit for feedback from your board and/or staff members. Though feedback is rarely inappropriate, we are not responsible for any comments, words, or language people may use in their survey responses. While survey responses are compiled by the computer and not attributed to the writer, we accept no liability for people making remarks that may be inappropriate or could identify them to their peers.

We suggest that the results first be reviewed by a sub-group of the board – governance committee, executive committee or a board engagement task force – then assemble the full board to discuss the results of the survey and set reasonable expectations for what can be accomplished. You want to encourage everyone’s participation, identify areas of mixed perceptions or misunderstanding, and identify 2-3 things that the group feels can be done to improve the work of the board over the next 6 months to a year. One caveat, don’t let yourself off the hook with only discussing peripheral issues that have already been explored – like “we need to add two new board members”.