

## How to Conduct a Board Assessment

If you think your board is ready for a self-assessment process, here's the step-by-step process:

**Step 1. Get the board on board.** Be clear about why you are doing the assessment. Share the benefits and what outcomes you hope to achieve. Ask for their commitment to both complete the survey and to participate in discussion about the results.

**Step 2. Determine who will process the results.** Typically a designated board committee, such as the governance committee, leads the effort. When we help organizations with board assessments, we provide the survey and analyze the results.

**Step 3. Send the survey.** A board champion sends the survey along with a compelling message about its importance and the deadline for completion. Reminders help assure 100% participation.

**Step 4. Examine the results.** Review the survey results. It may be obvious that there are areas of strength as well as weakness. An experienced board member or consultant can assist with analysis and provide insight on how your results compare with other organizations.

**Step 5. Share the results.** Before discussing the findings with the full board, share the results with the lead committee.

**Step 6. Hold a board retreat.** An annual board retreat is helpful for most organizations. If the assessment is done prior to the retreat, time can be spent reviewing and analyzing the results together. Enlist the help of a consultant to guide the discussion, share best practices and develop a preliminary board development plan.

**Step 7. Governance Committee executes the plan.** This committee finalizes the board development plan and determines next steps to move the group forward. Team building, training, and/or leadership development are examples of activities that may be included in the plan. When an assessment is conducted annually, it serves as a tool that will help you monitor and celebrate progress.