

Board Self-Evaluation – Individual Board Members

The tool provided below is for individual self-evaluation. Board members are asked to evaluate themselves on each item using a tool such as Survey Monkey. They do so anonymously in order to encourage frankness and ensure privacy. The instrument can be completed between Board meetings. There should be space for comments at the end of the survey. Just going through the exercise itself should remind board members of what is expected and encourage them to improve in areas where they are deficient. Please feel free to adapt the tool below to your situation. Your aggregate data should give the committee on trustees (nominating committee) information on how the board sees itself and possibly identify areas for board development. Some committees may want to complete the instrument for each Board member at the same time that Board members complete it themselves and contrast the aggregate results.

Note that this tool measures the strengths of individuals rather than the board as a whole. ISACS recommends boards do whole board evaluation one year and evaluation of individual board members the next, (see separate monograph), so that board evaluation takes place annually. May or June is usually a good time to undertake this.

Please select the appropriate number:

4. Strongly Agree 3. Agree 2. Disagree 1. Strongly Disagree *DK/NA
***Don't know/not applicable**

1. I understand the mission of the school and use it to inform my discussions and decisions as a Board member.	4	3	2	1	DK/NA
2. I understand the school's history, culture, major programs, services, and activities.	4	3	2	1	DK/NA
3. I read and understand the school's financial statements.	4	3	2	1	DK/NA
4. I understand the Board's major policies.	4	3	2	1	DK/NA
5. My personal interest in the school's success is high.	4	3	2	1	DK/NA
6. My attendance at board and board committee meetings is good.	4	3	2	1	DK/NA
7. My engagement at board and board committee meetings is high.	4	3	2	1	DK/NA
8. I prepare well for board and board committee meetings by reading all materials sent out in advance.	4	3	2	1	DK/NA
9. I complete all assigned tasks in a timely manner.	4	3	2	1	DK/NA
10. I contribute funds to the school in keeping with my means as one of my highest philanthropic priorities.	4	3	2	1	DK/NA

11. I assist the school's fundraising efforts.	4	3	2	1	DK/NA
12. I have special skills which I donate to the school on as an unpaid volunteer.	4	3	2	1	DK/NA
13. I promote the school in my personal and professional circles.	4	3	2	1	DK/NA
14. I do not speak for the Board unless asked to do so.	4	3	2	1	DK/NA
15. If I disagree with a Board decision, I refrain from saying so outside of Board or Board committee meetings.	4	3	2	1	DK/NA
16. I do not allow personal interests or those of another organization to conflict with the school. I declare any conflicts of interest and abstain from any discussion and decisions regarding those interests.	4	3	2	1	DK/NA
17. I always keep the Board's work in confidence.	4	3	2	1	DK/NA
18. I do not use my Board position for favors or gain for myself, my family members, or anyone.	4	3	2	1	DK/NA
19. I contribute appropriately to Board discussions—not too much, and not too little.	4	3	2	1	DK/NA
20. If I report to the Board, I submit written materials in advance in a timely manner and cover the main points succinctly in the report.	4	3	2	1	DK/NA
21. I have a good working relationship with the head of school.	4	3	2	1	DK/NA
22. My interactions with school employees never undercut our relationship with the head of school.	4	3	2	1	DK/NA
23. I understand and abide by the boundaries between management and governance.	4	3	2	1	DK/NA
24. I help keep the Board focused on fiduciary and major strategic matters rather than trivial administrative matters.	4	3	2	1	DK/NA
25. I work well with other Board members.	4	3	2	1	DK/NA
26. I respect the Board leaders and try to help them in every possible way.	4	3	2	1	DK/NA
27. My contribution to the success of the Board is high.	4	3	2	1	DK/NA
28. I enjoy being a Board member at this school.	4	3	2	1	DK/NA

Please comment on any of the above:

Author: Unknown. Revised by Keith Shahan, March, 2014