Board Self-appraisal Guidelines

1. Why School Boards Self-Assess

"Assessment is about the future and ensuring that the board's contribution to the organization is always top quality." (BoardSource *101 Board Basics*)

"The School Board ensures that it evaluates systematically and regularly its own effectiveness in performing its duties." (MSA Accreditation Standard)

2. Purpose of Board Self-appraisal:

a. Identify ways in which the Board can enhance its performance.
b. Ascertain to what extent the Board met its Board goals for the year.
c. Refine the shared understanding of the Board's role and responsibilities.
d. Improve communications within the Board and with the Director.
e. Signal to the rest of the organization the importance of accountability.
f. Determine Board Goals for the next school year.

3. Standards for evaluation: Determined by the board itself..., usually of two types:

a. Board operations; in accordance with effective governance practices and the Board's own Essential Agreements regarding operational norms.
b. Attainment of Board goals for the school year.

4. Follow-up:

A timely and authentic self assessment will prompt discussion and action leading to affirmation and/or improvement of the Board's performance. Specific agreements regarding operational norms, strategic analysis of why certain goals were not met, determining Board goals for the future, and identification of particular areas of interest to emphasize in the next Board Development Retreat are examples of effective use of the self-appraisal process.

5. Timing:

September - designate who is responsible for coordinating the self-appraisal (e.g. Governance Committee, Chair, Secretary, designated task force)
March - agree on the instrument/process; brief board members
April - conduct self-appraisal
May - discuss results as a board
June - determine next year's goals and develop outcomes for August Board Retreat

6. Ingredients for an Effective Board Self-Assessment

1. A joint commitment from the CEO, board chair, and all board members.
2. A small group (e.g., governance committee) charged with coordinating the process.
3. An evaluation of both the board's operations and its achievement of board goals.
4. A customized instrument for eliciting information from each board member that views the board's performance against predetermined criteria that apply to the organization.
5. An instrument that provides opportunities for multiple-choice rankings and elaborating comments.
6. A process that allows board members to be candid without fear of awkwardness, compromising themselves, or having their questionnaire responses attributed directly to them.
7. A process that does not overtax the capacity/willingness of Board members to engage fully.
8. A forum for exploring the results and their consequences.
9. Commitment to follow-up with a plan of action with concrete, assignable, and executable steps and measurable indicators to act on the results.

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