

Board Self-Assessment: *Annual Review of Performance*

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& Board Source

Please indicate below how well you believe you are discharging the following roles and responsibilities as a Board member - Grade on a scale from 1 to 3, with 1 for unsatisfactory/needs improvement; 2 for satisfactory; and 3 for excellent. Comments are also invited.

PART 1 – PERFORMANCE OF INDIVIDUAL BOARD MEMBERS

Board Member Role, Responsibility or Function	Rating	Comments
1. How would you rate your knowledge about the mission, goals, and programs of organization?		
2. How would you rate your support and promotion of the mission and goals of the organization?		
3. How would you rate your regular board meeting attendance?		
4. How would you rate your active participation in Board discussions and deliberations?		
5. How would you rate your service and participation on committees (i.e., Do you actively serve on and participate in the activities of at least one committee)?		
6. How would you rate your contributions in the area of promoting the association in professional or personal interaction with other Jewish Community leaders, clergy, etc.		
7. Did you attend retreats or other events (other than Board or committee meetings)?		
8. How well do you understand what is expected of you as a board member?		
9. Are you aware of the Executive Director's performance review/evaluation?		
10. How would you rate your understanding of your legal and fiduciary responsibilities as a Board member, including the duties of loyalty and trust?		

11. How would you rate your regular reading of materials that are distributed at Board or committee meetings?		
12. How would you rate your regular reading of the emails or other materials distributed?		
13. Have you found your participation on the Board to be stimulating and rewarding?		

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PART 2 – PERFORMANCE OF BOARD AS A GROUP

Board Member Role, Responsibility or Function	Rating	Comments
1. The Board respects and upholds the organizations mission		
2. The Board has revisited the organizations mission with an appropriate frequency and level of attention.		
3. The Board has clearly defined goals and objectives relating to the pursuit of the organization's mission.		
4. The Board is evaluating whether the organization is making progress toward achieving its mission with an appropriate frequency and level of attention		
5. The Board appropriately manages its own operation and functioning		
6. The Board develops and follows a clearly defined work plan.		
7. Board committees develop and follow a clearly defined work plan.		
8. The Board provides its members with sufficient education, training, and leadership development.		
9. Board committees are properly executing delegated authority, including reporting their activities to the full board.		
10. The Board nomination process is functioning appropriately.		
11. The expectations for Board members are well defined and have been adequately communicated to new board members.		

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PART 2 – PERFORMANCE OF BOARD AS A GROUP (Continued)

Governance	Rating	Comments
12. Meetings are run efficiently and effectively, and often enough to cover Board business		
13. Board minutes are timely and concisely summarize Board discussion, decisions, and needed actions.		
14. Board minutes are readable, contain important action items/to-do lists and are not so long as to burden members with too much detail.		
15. Board members arrive on time		
16. Board meetings begin on time		
Recruitment/Orientation		
17. Board has participated in strategic board recruitment process that seeks new members who offer necessary skills and diversity, rather than prospects who are simply friends of current members.		
18. There is an adequate job description for Board members		
19. New Board members are given a thorough orientation and necessary background materials. Board members are adequately knowledgeable about the organizations programs. Board members understand the mission and purpose of the organization. Board members can answer questions about mission, if asked.		
Planning/Policy		
20. Board ensures that the organization is living up to its mission. That programs fit the mission. That goals and objectives are met.		
21. Board has participated in a planning process in the last two years and has a strategic vision for the organization.		
22. Board monitors program evaluation for effectiveness.		