

Self Assessment for Health Foundation Boards

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Why Assess Board Performance?



Celebrate board
strengths and
core capacities

Stronger Board Performance

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Surface areas of
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Celebrate board strengths and core capacities



Surface areas of challenge or concern



Create space to prioritize and plan for board development

Stronger Board Performance

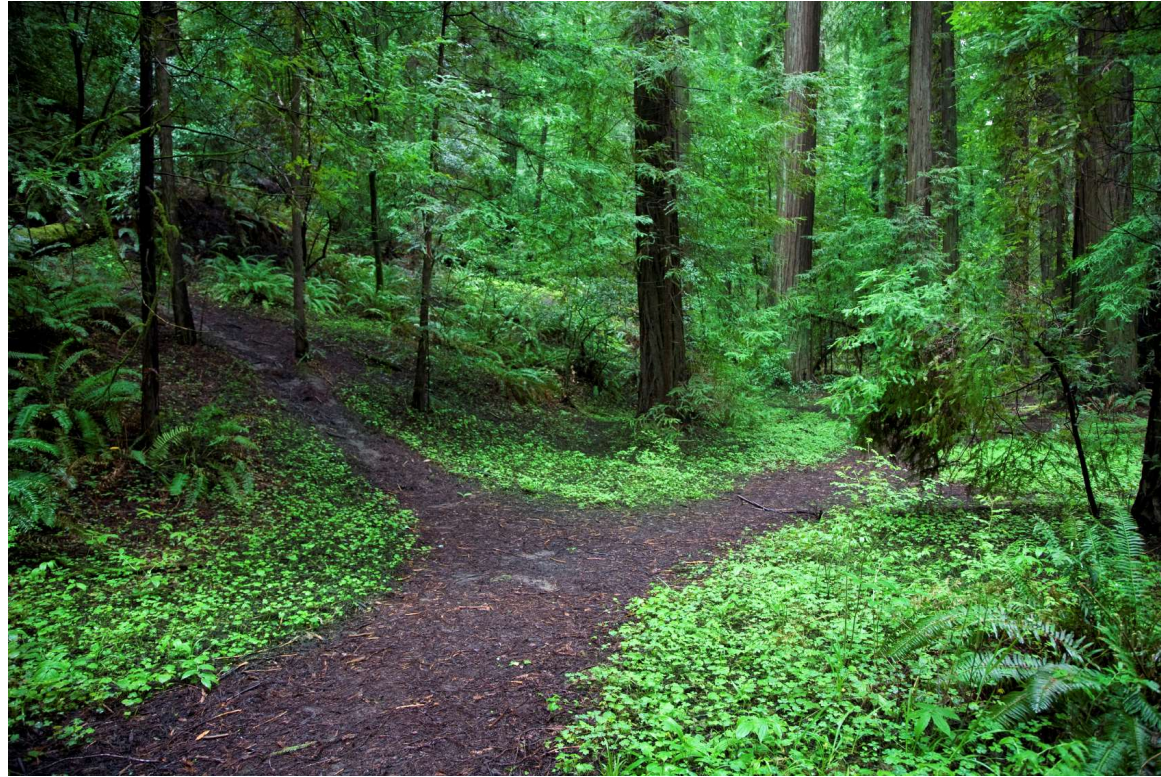
Research Shows:

Self-Assessment = Stronger Performance

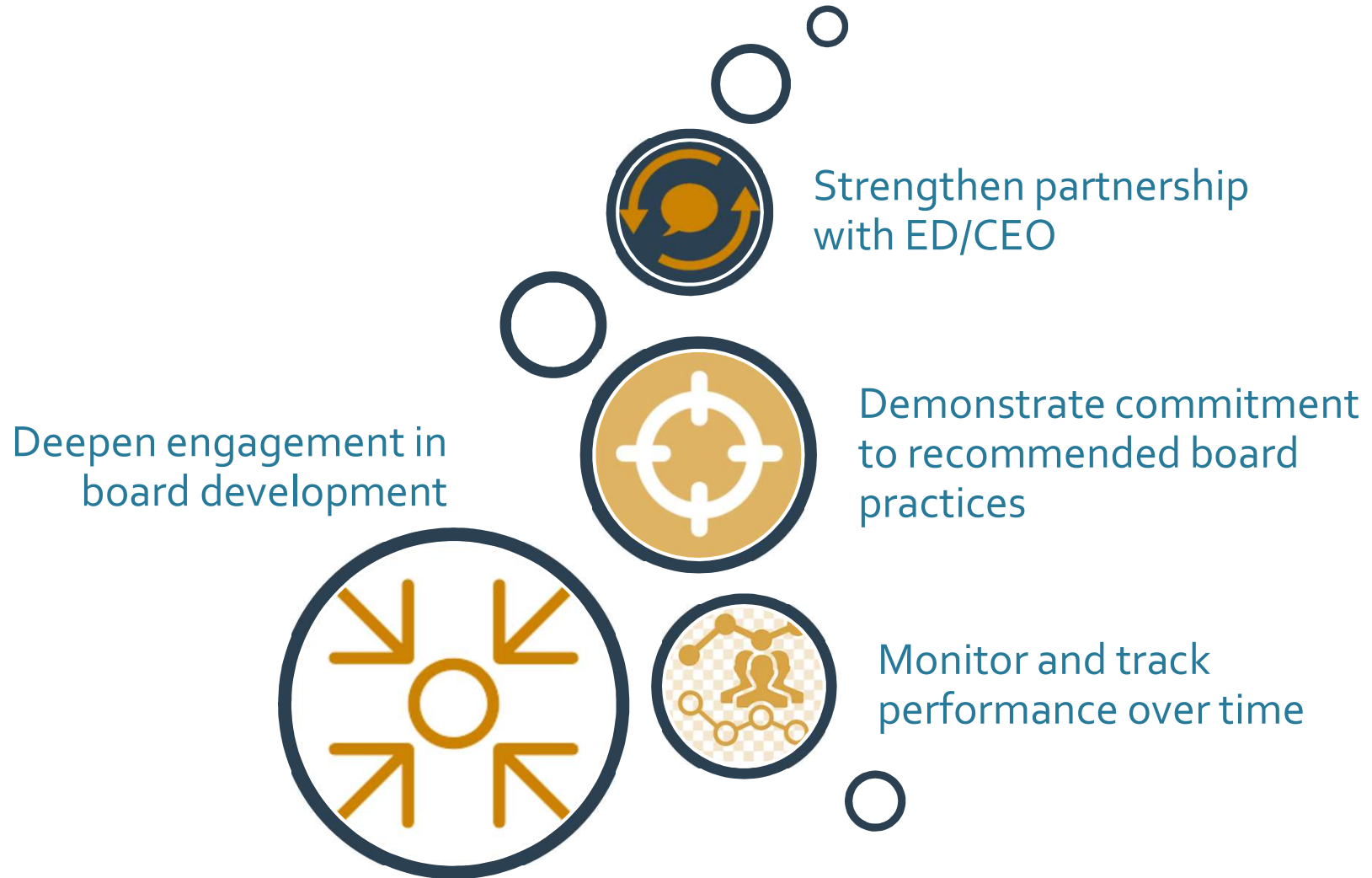
Area of Board Performance Ratings Reported by Executives Based on a Four-Point Scale	Assessed in past 2 years	Assessed ever	Never assessed	Variance
Setting the organization's strategic direction	2.68	2.45	2.11	0.57
Monitoring impact in the context of the strategic goals or objectives	2.36	2.17	1.81	0.55
Evaluating the chief executives performance against goals	2.47	2.15	1.94	0.53
Financial oversight	3.18	3.09	2.68	0.50
Providing guidance to the chief executive	2.72	2.62	2.22	0.50
Thinking strategically as a Board	2.50	2.28	2.05	0.46
Understanding the Board's roles and responsibilities	2.67	2.61	2.26	0.41
Building a diverse and inclusive Board with a commitment to equity	2.00	1.67	1.59	0.40

Notes from the Field:

How Board Self-Assessment Can Make a Difference



Additional Benefits :



When Should You Assess?

Potential Reasons to Assess	
<ul style="list-style-type: none">• When you need to surface challenges with board performance and dynamics• In early preparation for a staff leadership transition• Consistent and regular frequency<ul style="list-style-type: none">– BoardSource recommends every two years	

When Should You Assess?

Potential Reasons to Assess	Potential Reasons to Wait
<ul style="list-style-type: none">• When you need to surface challenges with board performance and dynamics• In early preparation for a staff leadership transition• Consistent and regular frequency – BoardSource recommends every two years	<ul style="list-style-type: none">• In the midst of a crisis• When you have a brand new staff leader (CEO or ED)• If you don't have the time to dedicate to a thoughtful conversation about the results

Set Yourself Up for Success: Pre-Assessment Conversations

- **Discuss the Purpose:**
 - Identify the goals and priorities for the self-assessment process, and how the results of the assessment will be used to strengthen board performance
- **Discuss the Process:**
 - Provide an overview of the approach to the self-assessment, the tool(s) that are being used, and framing for participation
 - Provide timeline and logistics for individual board member engagement
- **Discuss Questions and Concerns:**
 - Allow for an open board discussion to address questions or hesitations about the process

Additional Resources

- [Assessing Board Performance](#) (topic page)
- [BoardSource's Assessment Tools](#), including our Board Self-Assessment for Foundations (BoardSource-facilitated assessment tools)
- [Six Sign's It's Time to Assess Your Board's Performance](#) (article)
- **Consultant-led Assessment Engagements** – email us at consulting@boardsource.org for a referral to a BoardSource-affiliated consultant

Thank you!

