

Board Self-Assessment Template

This confidential self-assessment is designed to help our board reflect on individual and collective performance, identify areas for growth, and assess the inclusivity and effectiveness of our board culture and practices. Please respond honestly and thoughtfully. *This survey should take approximately 20 minutes to complete.*

Please return your completed anonymous survey by [insert date]. Your feedback will be reviewed and used to inform board development goals for the coming year.

Thank you!

Section A. Individual Understanding & Contribution

1. I understand the organization's mission, vision, and strategic priorities.
2. I understand the respective roles of the board and staff.
3. I understand and fulfill my fiduciary duties (care, loyalty, obedience).
4. I understand my role in supporting fundraising and resource development.
5. I stay informed about the organization's programs, finances, and challenges.
6. I make time to support the organization beyond attending meetings (e.g., events, fundraising, committee work).
7. I actively participate in and prepare for board meetings.
8. I contribute meaningfully to the board's strategic thinking.
9. I help create space for all voices to be heard in discussions.

Section B. Individual Experience

10. I feel valued, respected, and a sense of belonging on the board.
11. I have not seen and/or witnessed disrespectful and/or exclusionary behavior by fellow board members.
12. I feel empowered to address disrespectful and/or exclusionary board member behavior if it arises.

Section C. Board Composition & Recruitment

13. Our board's size is effective
14. Our board is representative of the communities our organization serves and impacts.
15. Our board has the right mix of expertise and diversity (finance, fundraising, legal, programmatic, lived experience) to fulfil its purpose.
16. Our board has clear and intentional recruitment and onboarding processes
17. Board policies address the need to be representative and inclusive of the communities our organization serves and impacts

Section D. Governance & Leadership

18. Our governance structures (e.g., bylaws, committee structures, leadership roles) are effective
19. Our board has a clear understanding of its roles and responsibilities.
20. Our board maintains appropriate boundaries between board and staff roles.

21. Our board effectively monitors organizational performance and financial health.
22. Our board ensures the long-term sustainability of the organization.
23. The board chair is engaged, communicates well, and manages disagreement productively.
24. The board has a positive and supportive relationship with the Executive Director.
25. The Board ensures the Executive Director is held accountable in their leadership through an evaluation or other tools.
26. Board decisions are made with adequate information and deliberation.
27. Board decisions are informed by input from (a) constituents most impacted by those decisions and (b) people with the most knowledge about the subject (e.g., staff, partners, community members, experts).

Section E. Meetings & Culture

28. Board meetings are well-organized, engaging, and productive.
29. Board discussions are inclusive and respectful.
30. Power imbalances (e.g., tenure, lived experience, background) are acknowledged and effectively navigated in meetings and discussions.
31. The board environment encourages different perspectives and disagreement.
32. The board effectively addresses conflict and tensions.

Section F. Accountability & Celebration

33. Board members are held accountable to their commitments and behaviors.
34. The board regularly evaluates its own performance.
35. The board holds itself accountable to our partners and communities, especially historically excluded and Indigenous communities.
36. The board seeks training and education to address gaps in skills, awareness, and knowledge.
37. The board recognizes and celebrates successes.

Section G. Fundraising & Succession Planning

38. The board as a whole actively contributes to resource development (e.g., networking, fundraising strategy, training)
39. The board has policies that support healthy longevity (e.g., term limits).
40. The board actively engages in succession planning for leadership roles.

Section H. Final Reflections (Open-Ended)

41. What has made your experience on this board meaningful?
42. What is one area where the board could improve?