

Evaluating Board Members' Performance: key questions to ask

The performance and outlook of each board member should be evaluated on a periodic basis, preferably once during every year of their service. This collective look-in-the-mirror is a proactive exercise designed to get the Board Governance Committee and the executive director insight into how the board operates, and how it perceives both itself and the entire organization. One result may be that you gain insight into the positive dynamics of the board and can consider how to build on those strengths. Or, an evaluation can operate as a diagnostic tool that gives you a head start on addressing problems before they get out of hand and threaten the well-being of your nonprofit.

Friendly is the most productive mood to bring to the evaluation process. You are having a conversation, not conducting an inquisition. An adversarial approach is not going to evoke thoughtful responses from a board member and it will definitely reduce a member's willingness to extend him or herself for the benefit of the organization. Begin the conversations with open-ended questions that will lead organically to more specific follow-up. This approach allows both speakers to guide the discussion to substantive topics. A simple question such as, "How has your board experience been?" can move in as many directions as there are board

members. Each member has their own perspective on the board and these evaluations give you a look into the good and the bad of board dynamics and the opportunity to evaluate how each member's attitude toward the organization and his or her sense of responsibility to it influences board performance.

Other questions that have elicited productive responses addressed a member's sense of accomplishment (or disappointment) during their service; his or her understanding of their role of board; and the connection between a member's board service and their interests outside of the organization. Obviously, evaluations you conduct will be geared to getting the insight that you want into your board. The trick is to phrase questions that will draw out authentic responses from your board members.

There is another upside to the evaluation process: it provides the occasion to get extra benefit from a board member. For instance, some time ago I had been trying to set up a meeting with a certain high profile professional. The interest was not reciprocated; he was evasive and showed no inclination to meet with me. It so happened that one board member was his acquaintance, so I slipped that issue into our talk, making clear how the connection would benefit our organization. A good rapport having been established, I pulled my chair closer to him, "Thomas, would you be able to

arrange a meeting with..." Quite soon thereafter we three met and that was the key ingredient for success.

Here are key questions to ask Trustees When Evaluating Their Work – these are usually administered once a year:

- How do you understand your role on the board?
- How has your role on the board changed during this past year and/or during the full course of your service?
- Would you tell us/me about some of your relationship or business interests outside of our organization?
- What sense of accomplishment (or disappointment) have you experienced during the past year of service?
- What objectives should be the priority of the board during the coming year?
- What should the board composition or work look like in the future to address changes our community?
- What is your perception of our board's culture of giving and how we manage philanthropy among the trustees? Please include your thoughts about your own giving as well.