



**PASO DEL NORTE
HEALTH FOUNDATION**
REALIZE BOARD TRAINING
IN HONOR OF ROBERT H. HOY, JR.

THE BENEFITS OF BOARD SELF-ASSESSMENT

Presenter


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Welcome and Introductions

 Introduce yourself

 Say whether you're currently serving or have served on a non-profit board of directors



ABOUT THE REALIZE BOARD TRAINING PROGRAM

REALIZE Board Training

☀️ Why REALIZE Board

☀️ “Brown Bag” Series

☀️ Fall Summit



What We'll Cover Today

- ☀ Traits of an Effective Board Member
- ☀ What is a Board Self-Assessment?
- ☀ Is Your Board Ready for a Self-Assessment?
- ☀ Self-Assessment Tools and Processes
- ☀ Steps for a Board Self-Assessment
- ☀ Questions and Answers
- ☀ Helpful Resources
- ☀ Upcoming “Brown Bag Series”



**WHAT ARE THE TRAITS OF AN
EFFECTIVE BOARD MEMBER?**

Traits of Effective Board Members

- ☀ They're passionate about the mission.
- ☀ They open doors to donors—and are donors themselves.
- ☀ They focus on the mission with a view to the big picture.
- ☀ They aren't afraid to ask the hard questions.
- ☀ Effective board members hold themselves and the organization accountable.



WHAT IS BOARD SELF-ASSESSMENT?

Board Self-Assessment is

- ☀ An opportunity for a board to ask itself, “How are we doing?”
- ☀ Also an opportunity for board members to ask themselves, “How am I doing?”

A Board Self- Assessment Will

- ☀ Tell you how the board *thinks* it's doing at this point in time
- ☀ Serve as a baseline for developing an improved governance effort
- ☀ Serve as a “starting point” for board discussions on strengths and weaknesses

A Board Self- Assessment Will Not

- ☀️ Replace a strategic planning process or organizational assessment
- ☀️ Take the place of the evaluation of the Executive Director/CEO
- ☀️ Solve all the board “issues”—no miracle cure!



**IS YOUR BOARD READY FOR A
SELF-ASSESSMENT?**

Questions to Ask

- ☀ Is the board and staff ready to commit to the entire process?
- ☀ Is there a current soon-to-be change in board leadership?
- ☀ Can you connect this process to your strategic planning or implementation process?



Table Top Discussion

**What Are Some Objections to
Board Self-Assessment?**



Objections to Self-Assessment

- ☀ Self-Assessments Are Not Necessary
- ☀ We Don't Need Changes
- ☀ We're doing fine – Why do we need a Self-Assessment?
- ☀ We Don't Have Time
- ☀ We've Done it in the Past with Poor Results
- ☀ We Have More Important Business

Board Self-Assessment Benefits

- ☀ Identify the areas of board performance that are strongest and those that need improvement
- ☀ Identify priority areas for the board to focus on over the next 1 or 2 years
- ☀ Allow different views to emerge



AREAS TO CONSIDER ASSESSING

Top Considerations

Board Governance

 Mission and Vision

 Planning and Evaluation

Financial

 Human Resources (Personnel)

 Public and Community Relations

Fund Development

 Strategic Planning

 Programs and Services



TOOLS AND PROCESSES

Variety of tools and processes for assessments

Questionnaires

-  On-line resources created by other organizations or consultants
-  Design your own

Interviews

Both Questionnaires and Interviews

Outside Experts



GET READY!

First Steps

- ☀ Make sure everyone is “all in.”
- ☀ Decide who will “own” the process.
- ☀ Decide what tool and/or process you will use.



GET SET AND GO!

Next Steps

- ☀ Complete the self-assessment process.
- ☀ Compile the results and produce a report.
- ☀ Review the results.
- ☀ Share the results.



FOLLOW-THROUGH

Follow-through

- ☀ Develop specific recommendations for improvement.
- ☀ Document and regularly report on the progress.
- ☀ Continually reassess board performance.



QUESTIONS & DISCUSSIONS

We Covered



WHAT IS A BOARD SELF-ASSESSMENT?



TOOLS AND PROCESSES



STEPS FOR A BOARD SELF-ASSESSMENT



CLOSING



MARK YOU CALENDARS

Brown Bag Series

Upcoming

Tuesday, August 28: Board Governance Session

In this session, participants will learn to:

- define the role of a board
- identify the board model that works best for different organizations
- identify and describe five primary board responsibilities
- understand the roles of the Board and Executive Director/CEO

Facilitator: Al Velarde, Executive Director, Paso del Norte Children's Development Center

Tuesday, September 25: Nonprofit Boards and Fundraising Session

In this session, participants will learn:

- different aspects of fundraising, including board and staff roles and responsibilities
- the fundraising process, including fundraising techniques and methods
- how to increase board member engagement
- how to evaluate performance

Facilitator: Bonnie Escobar, Director of Strategic Planning, Center Against Sexual & Family Violence



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THANK YOU!!