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**Board Assessment Tool**

Name of person completing form: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

The table below identifies key responsibilities of the board. Thinking over the past year, please rate your own performance in each area and the performance of the board as a whole. Please attempt to be as honest as possible. The intention of this tool is not to judge, but to build awareness and the ability to consciously work towards greater effectiveness.

**Rating scale:** 1 = seldom; 2 = sometimes; 3 = frequently; 4 = consistently

|  |  |
| --- | --- |
| **Personal Responsibility** | **Rating** |
| Regularly attends board meetings & membership meetings | 1 2 3 4 |
| Regularly attends Sunday services | 1 2 3 4 |
| Attends Unity classes & actively attempts to embody Unity principles in work of the ministry | 1 2 3 4 |
| Actively involved in service to the ministry | 1 2 3 4 |

|  |  |
| --- | --- |
| **Board Responsibility** |  |
| Conversant with bylaws and utilizes bylaws in decision making | 1 2 3 4 |
| Have written policy manual that is consistently utilized  | 1 2 3 4 |
| Is committed to vision/mission of ministry; plans & makes decisions aligned with vision/mission | 1 2 3 4 |
| Has clearly articulated plan for moving the vision/mission of ministry forward | 1 2 3 4 |
| Prepares annual budget & ensures that expenditures remain within confines of budget | 1 2 3 4 |
| Regularly evaluates board/spiritual leader & ministry as a whole against plan | 1 2 3 4 |
| Assures that leadership trainings &/or board retreats are held at least once a year | 1 2 3 4 |
| Maintains open communication with spiritual leader | 1 2 3 4 |
| Clearly & consistently communicates with congregation | 1 2 3 4 |

Teamwork is essential to the effectiveness of any board. This includes good teamwork among board members, and good teamwork between the board and its credentialed leader. For the ministry to thrive, the board and credentialed leader must work cohesively together for the highest and best of the ministry as a whole. In his book, *The Five Dysfunctions of a Team,* Patrick Lencionci describes five components of cohesive teams. They are:

1. Trust one another
2. Engage in unfiltered conflict around ideas
3. Commit to decisions and plans of action
4. Hold one another accountable for delivering against those plans
5. Focus on the achievement of collective results

The following table explores these in more detail. Please review each item and rate the board according to the following scale: 1 = seldom; 2 = sometimes; 3 = frequently; 4 = consistently

|  |  |
| --- | --- |
| Members of teams with absence of trust | Members of trusting teams |
| * Conceal their weaknesses and mistakes from one another
* Hesitate to ask for help or provide constructive feedback
* Hesitate to offer help outside their own areas of responsibility
* Jump to conclusions about the intentions and aptitudes of others without attempting to clarify them
* Fail to recognize and tap into one another’s skills and experiences
* Waste time and energy managing their behavior for effect
* Hold grudges
* Dread meetings and find reasons to avoid spending time together
 | * Admit weaknesses and mistakes
* Ask for help
* Accept questions and input about their areas of responsibility
* Take risks in offering feedback and assistance
* Give one another the benefit of the doubt before arriving at a negative conclusion
* Appreciate and tap into one another’s skills and experiences
* Focus time and energy on important issues, not politics
* Offer and accept apologies without hesitation
* Look forward to meetings and other opportunities to work as a group
 |

Numerical rating of team: 1 2 3 4

How are we doing this aspect well?

What could we do to enhance our effectiveness in this area?

|  |  |
| --- | --- |
| Teams that fear conflict | Teams that engage conflict |
| * Have boring meetings
* Create environments where back-channel politics and personal attacks thrive
* Ignore controversial topics that are critical to team success
* Fail to tap into the opinions and perspectives of team members
* Waste time and energy with posturing and interpersonal risk management
 | * Have lively, interesting meetings
* Extract and exploit the ideas of all team members
* Solve real problems quickly
* Minimize politics
* Put critical topics on the table for discussion
 |

Numerical rating of team: 1 2 3 4

How are we doing this aspect well?

What could we do to enhance our effectiveness in this area?

|  |  |
| --- | --- |
| A team that fails to commit | A team that commits |
| * Creates ambiguity among the team about direction and priorities
* Watches windows of opportunity close due to excessive analysis and unnecessary delay
* Breeds lack of confidence and fear of failure
* Revisits discussions and decisions again and again
* Encourages second-guessing among team members
 | * Creates clarity around direction and priorities
* Aligns the entire team around common objectives
* Develops and ability to learn from mistakes
* Takes advantage of opportunities before competitors do
* Moves forward without hesitation
* Changes direction without hesitation or guilt
 |

Numerical rating of team: 1 2 3 4

How are we doing this aspect well?

What could we do to enhance our effectiveness in this area?

|  |  |
| --- | --- |
| A team that avoids accountability | A team that holds one another accountable |
| * Creates resentment among team members who have different standards of performance
* Encourages mediocrity
* Misses deadlines and key deliverables
* Places an undue burden on the team leader as the sole source of discipline
 | * Ensures that poor performers feel pressure to improve
* Identifies potential problems quickly by questioning one another’s approaches without hesitation
* Establishes respect among team members who are held to the same high standards
* Avoids excessive bureaucracy around performance management and corrective action
 |

Numerical rating of team: 1 2 3 4

How are we doing this aspect well?

What could we do to enhance our effectiveness in this area?

|  |  |
| --- | --- |
| A team that is not focused on results | A team that focuses on collective results |
| * Stagnates/fails to grow
* Rarely defeats competitors
* Loses achievement-oriented employees
* Encourages team members to focus on their own careers and individual goals
* Is easily distracted
 | * Retains achievement-oriented employees
* Minimizes individualistic behaviour
* Enjoys success and suffers failure acutely
* Benefits from individuals who subjugate their own goals/interests for the good of the team
* Avoids distractions
 |

Numerical rating of team: 1 2 3 4

How are we doing this aspect well?

What could we do to enhance our effectiveness in this area?

What do you notice from completing this review?

What do you believe are the critical areas for the board to focus on for the next year?