

1998 International Conference on Volunteer Administration

Evaluating Individual Board Members: A Training Summary

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ABSTRACT

An ineffective board of directors can be a nonprofit organization's greatest headache and can prevent the agency from adequately serving its clientele. During the 1998 International Conference of Volunteer Administrators, Leslie Linton and Alice Zacarello outlined five steps to rejuvenate your board of directors by making each board member personally responsible for achieving the agency's annual goals. The keys to accountability for a volunteer board of directors include developing annual and long-range plans, obtaining written commitments from board members to help achieve the annual goals, orientation for new board members, reviewing the annual plan at each board meeting, and an annual self-assessment by each board member as to their performance in achieving the agency's goals.

How effective is your agency's volunteer board of directors? Do members attend meetings? Do they participate in the agency's programs or contribute in other ways? Do they interpret the agency's mission to the public? These issues were addressed during a workshop entitled Evaluating Individual Board Members during the 1998 International Conference of Volunteer Administrators.

Leslie Linton and Alice Zacarello have more than 30 combined years managing non-profit organizations. Both presenters are now independent consultants, helping nonprofit organizations improve their management and organizational skills. They shared their expertise in managing and evaluating non-profit boards with more than 25 participants at the annual conference.

Linton and Zacarello outlined a five-step process for developing a more effective board of directors: Develop a long-

range plan for your organization every three years, Board members make an annual commitment to their responsibilities in the annual and long-range plans, Provide orientation for all new board members, Review the long-range and annual plans at every board meeting, and Evaluate the annual and long-range plans at the end of each program year and have each board member complete an individual self-assessment.

Successful agency accountability begins with the long-range and strategic planning process. During an annual retreat, the board evaluates the previous year's program, the long-range plan, and takes a deep look at its mission and values. The outcome of this process should be a new or revised mission, values and vision statement and a set of annual goals to guide the agency during the coming year. Every third year, the board develops a new long-range plan.

Dr. Barry Boyd has served more than 15 years as a county Extension agent with the Texas Agricultural Extension Service. For the past six years, he has served as director of the 4-H and youth development program in Tarrant County, Texas, directing over 200 volunteers in carrying out educational programs reaching more than 18,000 youth. Dr. Boyd is responsible for recruiting and training 25 4-H Club Managers, 75 4-H project leaders and various 4-H program coordinators. He also serves as the advisor to the Tarrant County 4-H & Youth Development Committee. Dr. Boyd is a member of DOVIA - the Texas Connection and served on the Tours and Special Events Committee for the 1998 International Conference of Volunteer Administrators.

After setting the annual goals, each board member completes a personal action plan that includes both general board responsibilities and specific tasks he/she will accept to ensure that the annual goals are reached. In addition, each sets individual goals for personal growth.

Orienting new board members is the critical first step in integrating them into your team. The new members should receive a notebook that includes, but isn't limited to, the agency's bylaws, board roster, long-range and annual plans, a brief history and the mission of the organization, and a job description that includes what is expected of board members. All of these materials are reviewed and explained during a face-to-face orientation session with the new members.

The annual plan should be reviewed at every meeting to measure progress towards achieving the goals. The plan may also need to be altered as resources or issues change. An annual plan must be flexible to address an ever-changing environment.

The final step is the annual evaluation of the strategic plan. As part of this annual review, each board member completes a self-assessment that includes the following questions. How many regular meetings did you attend? Do you understand the organization's mission, vision and values? How involved were you in the annual Development Plan? What actions did you personally take to promote the organization to the public? Did you contribute names to the nominating committee? Did you attend or volunteer at any of the agency's programs the past year? Board members are asked to review their personal action plan to determine which of their responsibilities they accomplished and why others were not completed.

The agency staff member then uses this self-assessment, along with their observations, to recognize the board members' efforts, recommend how they can improve their performance, or determine

if the board member should continue service.

The keys to Linton and Zacarello's model is getting the board members' written commitment to the role they will take in carrying out the annual plan and the annual self-assessment that they will complete at the end of the program year. Written commitments serve as a reminder of the member's responsibilities, and they feel more accountable when such commitments are agreed upon publically. Knowing from the beginning that there will be a self-assessment in twelve months also serves to motivate board members.

Following these five steps can rejuvenate your volunteer board. With members who are committed to your agency's goals, your board of directors can make your agency more successful in serving its clientele. More information concerning evaluating board members may be obtained from the co-presenters at P.O. Box 224882, Dallas, Texas, 75222.