



Roles in the Process

What is BoardSource's role in the assessment process?

Purchasing our assessment tool means your board is ready for BoardSource, as a third party, to conduct a full-service evaluation of either your board or chief executive.

After purchase, you can expect the following from BoardSource:

- Communication with your designated facilitator on the project timeline and participation rates
- Communication with survey participants (including invitations containing their link and participation reminders)
- Troubleshooting issues with spam filters, survey submissions, and personal survey links

Although our team will be responsible for the creation and delivery of your evaluation's final report, we will not be involved in any detailed analysis of your results. Your report will include information on the final pages to help in proceeding with next steps. If your board would like to partner with an individual responsible for walking through your results, please visit our [Consultant Directory](#) to connect with a private governance consultant that matches your needs.

The purchasing organization is responsible for communicating with and getting the appropriate buy-in from the full board prior to purchasing our tool. Please review our [Process & Timeline](#) page to ensure you have taken the necessary steps to successfully prepare for an assessment.

Who should participate in the survey?

For a Board Self-Assessment (BSA) we recommend including your full board and the chief executive/head of school. If you choose to include any staff, we suggest limiting it to individuals who are directly knowledgeable about the work of the board and could provide useful insights. We also recommend purchasing a segmented version of the report (\$250) to view responses by role. Note: to protect the confidentiality of participant responses, we are unable to segment if there are less than 3 participants in any role.

For the Assessment of the Chief Executive (ACE), we recommend including your full board and the chief executive/head of school, who will complete the same version of the survey as a self-evaluation. Responses from the board will be compared side by side with the self-evaluation, to highlight discrepancies between how the chief executive perceives their performance, and how the board does.

While we do not restrict who you can include as a participant, please note that these tools are designed for the board, not for staff. In particular, the Assessment of the Chief Executive should not be used to solicit input from direct reports on the chief executive's performance. If for whatever reason you feel that it is important to include staff in your survey, we recommend that you limit the staff participants to individuals who are directly knowledgeable about the work of the board and could provide useful insights. Direct reports included in the Assessment of the Chief Executive (ACE), will have their responses automatically separated out in the final report at no additional charge.

What are the roles within the purchasing organization in the assessment process?

Before purchasing an assessment, it is important to understand an individual's role in the assessment process.

The Governance Committee (or similarly tasked group) is responsible for:

- Overseeing the assessment process
- Taking the lead in selecting an assessment tool and implementing the process
- Reviewing results with the full board and taking the lead in creating and implementing a board development plan to address challenge areas



- Ensuring assessments take place regularly to track progress

The Board Chair is responsible for:

- Willingly engaging in the assessment process and encouraging others to do so
- Respecting the governance committee's oversight role
- Showing initiative in adopting recommendations from the assessment

The Chief Executive or Executive Director is responsible for:

- Staying informed about the assessment process
- Completing the survey (if asked by the governance committee)
- Reviewing assessment results and encouraging/assisting the board in using assessment results to improve performance

The Board at large is responsible for:

- Completing the assessment questionnaire in a timely manner
- Reviewing results and/or recommendations shared by the Governance Committee
- Participating in a board retreat, if the Governance committee deems it appropriate

A nonprofit consultant* (should you choose to [hire one](#)) would typically be responsible for:

- Serving as a facilitator for the assessment process
- Summarizing feedback
- Facilitating the board's discussion of the results

**For more information, please see our Consultant Directory [here](#)*

What is an organizational facilitator? What is their role in the assessment process?

To ensure a smooth process, BoardSource asks for your organization to identify one individual as a “facilitator”. The facilitator is a representative chosen by your organization to be the primary point of contact. This chosen representative is often either the Board Chair, the immediate past Board Chair, the Chair of the Governance Committee, or a nonprofit consultant (if your organization has engaged one) but should always be someone who has access to the information needed to start the survey process and is comfortable coordinating this process in partnership with BoardSource.



The organizational facilitator's main responsibilities include completing the intake form to initiate the assessment with BoardSource, sharing with all participants what emails to expect from BoardSource and how to add our email addresses to their safe sender list, tracking participation in partnership with the assessments team at BoardSource, and authorizing the close of the survey (once the desired participation rate has been met). The facilitator will also receive the final report once the survey has been closed and is responsible for distributing those results to the board (or a subset of the board) in the manner that best suits the organization's needs.

