

Volunteer Self-Evaluation

Prepared by:
Jeff Rendel
Rising Above Enterprises

3770 Deerlodge Circle
Corona, CA 92881-8461
(951) 340-3770
jeff@jeffrendel.com



Presented by
Kevin Smith,
Center for Professional Development
Kari Jordahl,
Instructional Design Consultant



Introduction

Welcome to the course on *Volunteer Self-Evaluation*. This course is part of CUNA's Training On-Demand Series for Volunteers.

In this course, you will learn about board self-evaluation, which helps to ensure that your board of directors is efficient and effective.

When you take an honest and comprehensive look at your board, it helps you become more competitive, and keeps you on the forefront of changes that affect the credit union and its members. You can see how the board of directors governs and works together, as well as how you grow independently and hold yourself accountable.

The good news is...you do not need to bring in an outside expert to perform this analysis, for thousands and thousands of dollars. You can do it on your own through several simple monthly methods and some thorough review.

Why Evaluate?

While the idea of self-evaluation for process improvement is certainly not new, it was not commonly applied to boards until General Electric decided to give it a try. Years ago, GE's board of directors set out to self-evaluate their board and their committees. This included evaluating individual members on an annual basis. Every year they would bring in an outside expert in corporate governance to

contact each director and solicit comments in respect to both the full board and any committees on which the director served. They would also ask for comments on director performance and board dynamics.

The overall goal of this self-evaluation was to find ways that the board could improve its key functions...things like overseeing the CEO, financial analysis, major issues of strategy, risk, integrity, reputation, and governance.

| SELF-PERFORMANCE EVALUATION | |
|-----------------------------|---|
| | Performance Factors |
| 1 | Quality of Work: Ability to provide neat, accurate and thorough work appropriate level based on understanding gained through experience and training. Adherence to policies and procedures including safety. |
| 2 | Quantity of Work: Ability to produce required volume of work in a timely manner. |
| 3 | Initiative: Competency to start and complete assignments without direction. Recognize problems and apply or suggest viable solutions; engage in growth activities. |
| 4 | Adaptability: Willingness to learn new tasks and adapt to changing situations and handle various tasks simultaneously; perform job under pressure. |
| 5 | Cooperations: Ability and willingness to cooperate with associates and subordinates to accomplish job requirements and meet the needs of the organization. |

Self-evaluation for General Electric—and for your board of directors—can help to prioritize issues and improve the quality of discussions on key matters. It also helps to improve the quality of the presentations you receive from management.

You can identify specific issues that may need to be handled in a better manner. You can also identify issues that need to be discussed as you move forward, to help you grow as an individual board member, and as a collective member of the board.

Objectives

The objectives for this course are to learn three ways to evaluate or “grade” your board of directors:

- Use the **Comprehensive Ratings** to evaluate the board in:
 - Financial fitness
 - Board governance
 - CEO relationship
 - Strategic planning process
- Use the **Board of Directors Self-Evaluation**
You will learn how to use a simple, two-part questionnaire to help you understand how your board is functioning, and identify areas of improvement. Credit unions may complete these questionnaires annually or semi-annually. You will learn how to rank yourself, and how to rank your board on a scale of 1 to 5, to find areas of strength and areas of challenge that you need to grow and develop.
- Use the **Post-Board Meeting Evaluation**
The last objective is learning how to complete and analyze a post-board meeting evaluation form. This form can be filled out every month at the end of your board meeting, to help you quickly determine how the meeting went and what you need for next time. This form helps you discover what you can do to make the board meeting process more efficient and effective on a regular basis.

It’s up to you what method or methods you choose for board evaluation...they are all very effective. First, you’ll have to determine whether you want to take a comprehensive step and examine all four categories, or simply begin with methods to evaluate yourself and your board of directors.



Comprehensive Ratings

In this course, in order to help you truly understand the effectiveness of the board, we’ll begin with the most comprehensive process you can undertake.

This process helps you to evaluate your board in four overall categories.

1. Financial fitness
2. Board governance
3. CEO relationship
4. Strategic planning process

For each of these general areas, you can grade yourself on a scale of 1 to 5 for each of the points. At the end of the workbook in the **Appendix**, you will find the **Comprehensive Ratings Checklist**.

You can do this exercise independently, and then compare your results with the rest of the board members. After you have looked at each area and graded each specific item, take a look at the items where you have graded yourself the lowest. These will be areas where you should work to gain some additional expertise. Perhaps your board needs some additional training in order to obtain a better understanding of this responsibility.