Board Governance & Leadership Effectiveness Assessment

A Practical Executive Tool for Assessing Board Effectiveness, Governance Practices, and Leadership Oversight

Why This Matters

Strong governance is the foundation of every successful organization. While management is responsible for daily operations, the board is responsible for providing strategic direction, exercising fiduciary oversight, ensuring accountability, and safeguarding the organization's mission for the future.

Effective boards do more than approve budgets and attend meetings. They ask thoughtful questions, make informed decisions, support executive leadership, anticipate risks, and help position the organization for long-term sustainability.

As organizations grow and become more complex, governance practices must evolve as well. Periodically evaluating board effectiveness helps identify strengths, uncover opportunities for improvement, and promote meaningful conversations that strengthen leadership across the organization.

This assessment is designed to encourage honest reflection rather than serve as a compliance checklist. By evaluating key areas of governance, boards and executive leaders can identify priorities that improve decision-making, strengthen accountability, and enhance organizational performance.

Governance is not a destination—it is a continuous commitment to learning, stewardship, and organizational excellence.

Who Should Complete This Assessment?

This assessment is most valuable when completed independently by multiple organizational leaders before discussing the results together.

Recommended participants include:

- Board Chair
- Executive Committee Members
- Board Directors
- Chief Executive Officer / Executive Director
- Senior Leadership Team (optional)
- Governance Committee Chair (if applicable)

Each participant should complete the assessment independently. After all assessments have been completed, compare scores and discuss areas of agreement and differing perspectives. Differences in scoring often provide valuable insights that lead to stronger governance practices.

How to Use This Assessment

Rate each statement using the following scale:

Score	Rating
1	Strongly Disagree
2	Disagree
3	Neutral / Partially Implemented
4	Agree
5	Strongly Agree

Record your score beside each statement.

At the end of each section, total your score and record it in the space provided.

SECTION 1

Governance & Fiduciary Responsibilities

Statement	**Score (1–5)**
Our board clearly understands its governance responsibilities.	_____
Directors understand their fiduciary duties.	_____
Board members consistently act in the best interests of the organization.	_____
Conflicts of interest are disclosed and reviewed annually.	_____
Governance policies are reviewed regularly.	_____
Board members actively participate and prepare for meetings.	_____

Section Score: _____ / 30

SECTION 2

Strategic Leadership

Statement	**Score (1–5)**
The board regularly reviews the organization's strategic direction.	_____
Strategic priorities guide board decisions.	_____
Progress toward strategic goals is reviewed regularly.	_____
The board focuses on long-term organizational sustainability.	_____
Significant organizational risks are discussed proactively.	_____
Board meeting agendas prioritize strategic conversations over operational details.	_____

Section Score: _____ / 30

SECTION 3

Executive Leadership Partnership

Statement	Score (1–5)
Roles and responsibilities between the Board and CEO are clearly defined.	_____
Executive performance is evaluated regularly.	_____
The board provides constructive guidance and support to executive leadership.	_____
Difficult issues are discussed openly and respectfully.	_____
Leadership succession has been discussed and documented.	_____
Communication between executive leadership and the board is effective.	_____

Section Score: _____ / 30

SECTION 4

Financial Oversight

Statement	Score (1–5)
Board members understand the organization's financial reports.	_____
Financial statements are reviewed regularly.	_____
Annual budgets receive appropriate board oversight and approval.	_____
Financial risks are openly discussed and monitored.	_____
Internal controls and financial policies are reviewed periodically.	_____
Reserve levels and long-term financial sustainability are monitored.	_____

Section Score: _____ / 30

SECTION 5

Board Effectiveness

Statement	Score (1–5)
Board meetings are productive and well organized.	_____
Board materials are distributed in advance of meetings.	_____
Attendance expectations are consistently met.	_____
Board committees function effectively.	_____
Decisions and follow-up actions are documented and tracked.	_____
Board members contribute their expertise during discussions.	_____

Section Score: _____ / 30

SECTION 6

Leadership Development

Statement	Score (1–5)
New board members receive a structured orientation.	_____
Continuing board education is encouraged.	_____
Board recruitment is intentional and competency-based.	_____
The board regularly evaluates its own performance.	_____
Leadership succession planning is an ongoing priority.	_____
The board possesses the expertise needed to fulfill its responsibilities.	_____

Section Score: _____ / 30

SECTION 7

Governance Culture

Statement	Score (1–5)
Respectful discussion is encouraged during meetings.	_____
Diverse perspectives are welcomed and considered.	_____
Decisions are made collaboratively and transparently.	_____
Individual accountability is expected.	_____
Organizational mission guides board decisions.	_____
The board is committed to continuous improvement.	_____

Section Score: _____ / 30

Overall Assessment Score

Add the scores from all seven sections.

Total Score: _____ / 210

Interpreting Your Results

Total Score	Governance Assessment
180–210	**Strong Governance Practices** – Your board demonstrates effective governance, strategic leadership, and organizational oversight. Continue building on these strengths while pursuing continuous improvement.
150–179	**Effective Governance with Opportunities for Growth** – Your governance foundation is solid. Focus on strengthening specific areas to improve board effectiveness and organizational impact.
120–149	**Governance Requires Focused Improvement** – Several governance practices would benefit from additional attention. Prioritize the highest-scoring opportunities to strengthen board performance.
Below 120	**Governance Strengthening Recommended** – Your organization may benefit from reviewing governance structures, board responsibilities, strategic oversight, and leadership practices to improve long-term effectiveness.

Governance Action Planner

Our Greatest Governance Strengths

1. ____________________
2. ____________________
3. ____________________

Highest Priorities for Improvement

1. ____________________
2. ____________________
3. ____________________

90-Day Governance Action Plan

Action Item Person Responsible Target Date Status

Questions for Board Discussion

After completing the assessment, discuss the following questions as a board or leadership team:

1. Which assessment results surprised us the most?
2. Where were our scores most consistent?
3. Where did our perspectives differ, and why?
4. Which governance practices represent our greatest strengths?
5. Which one or two governance improvements would have the greatest impact on our organization over the next year?
6. What actions should we begin within the next 90 days?
7. How will we measure our progress before completing this assessment again?

Professional Use Notice

This assessment was developed by LEAP Skill Builders and reflects generally accepted principles of nonprofit governance, fiduciary oversight, board leadership, and organizational effectiveness. It is intended as an educational and organizational development resource and should not be construed as legal, accounting, or regulatory advice.

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