



The 360 Feedback Performance Appraisal: A Viable Board Assessment Option

So what would a more extensive, comprehensive and “holistic” Board performance assessment look like? How would it be designed? What models exist in the field which if modified can be used to measure governance effectiveness? Who would be involved and how would results be shared?

One of the most effective and comprehensive performance evaluations is the 360 Performance Feedback Review. Primarily used to assess individual employees or professional senior leadership through peer/employee feedback, this assessment/feedback process is a professional opportunity that enables a group of co-workers to provide feedback about a fellow employee's performance. The 360 review differs from an employee appraisal which traditionally provides the employee with the opinion of his or her performance as viewed by a supervisor. It relies almost exclusively upon the feedback of colleagues, institutional stakeholders and clients. It also enables the person being evaluated to engage in his/her self-reflection/assessment, the results of which are then compared and contrasted with the feedback from the other groups. This then leads to a professional “improvement” (development) plan for the individual being evaluated.

The advantages of engaging in this process are obvious. Its robust nature affords all stakeholders the opportunity to “weigh-in” regarding the person being assessed which can contribute immeasurably to his/her professional growth and development as well as productivity in the institution.

Now imagine what a 360 Feedback Appraisal would look like if it were to be applied to a Board of Directors Assessment.

Unlike a traditional Board self-study or review, a Board 360 Assessment:

Enables all constituents who are impacted by Board decisions and policies to provide critical feedback;

Provides the Board with a broader and richer perspective regarding its strengths, weakness and those areas which require improvement;

Creates a culture of sharing, buy-in and “thought-alignment;”

Provides the Board with a more comprehensive feedback mechanism and invites constituents to the table as partners;

Enables the Board to more fully understand its impact on specific constituents;

Helps ensure “institutional growth” and ways in which the Board can contribute to this growth;

Provides the Board with increased self-awareness for “organizational improvement;”

Depoliticizes the Board Performance Assessment process;

Creates an honest, thoughtful analysis of perceptions and feelings regarding Board processes, procedures, protocols and policies; and,

Decentralizes the Board's performance and evaluation process.

While the 360 Board Feedback process empowers institutional constituents to provide critical feedback to the Board, it also provides the Board with a much broader feedback process.

When drafting the Board's 360 Feedback Survey, it is important to note that Board members (as trustees) be required to respond specifically to questions pertaining to their own individual and collective Board roles and responsibilities.

One can develop “customized questions” based upon constituent perceptions and/or needs. For example, parents may want to express their feelings regarding the manner and process by which the Board addresses and processes scholarship assistance applications or tuition; teachers may want to focus on salary scales or vacation policies; the senior Executive or Head of School may want to focus on fundraising effectiveness; and donors may want to target the manner in which the Board fundraises or communicates with communal stakeholders.

It is wise to limit the number of constituent questions to about 10 questions. The remainder of the constituent questions should focus upon generic questions such as:

Do you have a clear sense regarding the role and responsibility of the Board?

Do members of the Board ever reach-out to you in a meaningful way?

Do you know the names of the Board members?

What is your perception regarding the Board's impact on the institution/school?

Were you ever invited as an individual or as a group to meet or socialize with the Board?

Is the Board doing an effective job in its fundraising efforts for the institution/school?

Do members of the Board serve as visible “school ambassadors” in the community?

Do you know how Board members are selected (or nominated) to the Board?

How do you feel about the Board's impact and effectiveness on your institution/school?

Have you ever been involved in a Board initiated Strategic Planning process?

At the end of the day, in addition to soliciting essential Board feedback, the 360 Board Assessment should provide the Board with a rich array of valuable constituent responses and feedback upon which to determine the Board's current effectiveness and impact.

This comprehensive approach, if designed and facilitated successfully, can provide the Board with amazing insights into its strengths, weaknesses and potential to evolve into a high performing governing entity.

Finally, as we know, the results of any Performance Assessment – especially a “360” – is only as valuable as the follow-up and actions taken resulting from the Assessment. To this end, to be effective, it will be essential that the Board, in partnership with the Senior Executive or Head of School, develop a strategic action plan designed to improve, enhance and when necessary re-envision the practices, policies and functioning of the Institution's Board of Directors.

To quote a close friend and colleague: “there are very few institutions of excellence with ineffective Boards; but, there are many poor institutions with ineffective Boards.”

The rest is commentary....

Dr. Chaim Y. Botwinick is currently principal of the Hebrew Academy Community School, Margate, FL., Organizational Consultant and Executive Coach. He has served in a variety of senior Jewish educational leadership positions on the local and national level. Dr. Botwinick is Co-Founder and senior partner at LEV Consulting Associates, and the author of “Think Excellence: Harnessing Your Power to Succeed Beyond Greatness”, Brown Books, 2011.

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