



ASSESSMENT AND EVALUATION

Boards have many jobs to do, but fundamental to them all is the answer to the question: How well is this club achieving its purposes? There are a variety of ways for nonprofit boards to go about researching this question. By looking at carefully and closely examining the performance of the club, the head coach, and the board itself, the board can ensure that the club has the infrastructure in place to deliver on its mission.

Boards are often unfamiliar with or uncertain about their responsibilities for monitoring various aspects of the clubs they govern. Designed to supplement the previous units, the tools in this unit offer guidelines for board members as they think about evaluation and include questions to help members stay focused on assessing the club's long-term health and well-being, rather than overseeing the day-to-day operations.

Guidelines for Evaluation

- Evaluation is the process of asking good questions, gathering information to answer them, and making decisions based on those answers.
- The output of evaluation is club learning -- a way for the club to assess its progress and change in ways that lead to greater achievement of its mission.
- Evaluation is an essential component of effective decision making, whether it be strategic planning or the quiet decision making of daily club life.
- Evaluation is a developmental, process, not a report-card process.
- Evaluation is most effective in an environment that is as risk free as possible.
- Evaluation is time and effort well spent, saves money in the long run by making better use of limited resources, and helps ensure the club's health and viability in a changing environment.

EVALUATION OF THE CLUB

The reluctance of board members to commission evaluations is understandable. The process may be unsettling, the results unflattering, and the costs substantial. But, the potential benefits are fundamental: to ensure that something important is being accomplished, and accomplished efficiently. Nonprofits are some of this country's most important innovators, and one of the sector's greatest value is its freedom to experiment. In many ways, nonprofits perform much of this country's research and development. But experiments are useless unless one learns how they came out. That is the question that evaluation must answer.

- An [Evaluation Checklist for Club Assessment](#) is designed to lay out the parameters of a club evaluation. It can be used to help board members understand the process and prepare them for this very important undertaking.
- [Key Questions for Club Assessment and Evaluation](#) will help board members understand the issues that will be covered during a club evaluation. It is meant as a starting point for thinking about a club's overall effectiveness and impact on the community. A club might use these questions at a board meeting or retreat to kick-off a discussion about the club's programs and services. This page can also be used to evaluate a particular program or service of the club.

EVALUATION OF THE HEAD COACH

Related to assessing the club is assessing the head coach. Many of the reasons why evaluation is important for the club hold true for assessing the head coach. But, a head coach also needs to know how he or she is doing. The board should make every effort to support the head coach and strengthen his or her performance. Neglect can be costly, resulting in high turnover, misunderstanding and miscommunication, mistrust, and ongoing poor performance.

Often board members hesitate to assess the head coach because of confusion over the club's goals and the head coach's responsibilities, or uncertainty about proper criteria for assessment. Boards also hesitate to conduct

formal performance evaluations because they feel obligated to support the head coach (who may be a friend), they worry that evaluation will disrupt the special relationship between the board and head coach, or because they fear confrontation. This all must be addressed in advance of the evaluation.

Types of Head Coach Assessment

1. Intermittent observation of the head coach by board members. Often lead by the board chair, this is a natural process in small, young clubs where board members are actively involved and work closely with the head coach.
2. A deliberate periodic assessment of the head coach by the board chair or other board members. The board chair evaluates the head coach's performance over the past year, in consultation with other board members.
3. Annual board committee review. The board and head coach look at the annual review of goals and head coach performance. This usually begins with the head coach's presentation of accomplishments of past year, relationship to goals originally set, and proposal for year ahead. The discussion should include an assessment of the head coach's strengths and weaknesses, plus ways to leverage and/or compensate for them. This is usually a more formal process that works well in small and large clubs.

[Evaluating the Head Coach](#) is a useful starting point for guiding a board that is about to embark on its annual performance evaluation of the head coach. Use this handout to encourage the board, executive committee, and/or others involved in the process to consider these lists as guidelines.

EVALUATION OF THE BOARD AND BOARD MEMBERS

The board should step back from its usual preoccupations and reflect on how well the board meets its' responsibilities. This process should include a look at board composition, identifying and recruiting board members, committee structure, meetings, relationship with constituencies, and overall performance. Most boards are caught up in the daily business of their clubs. Self-assessment gives the board a chance to step back and ask "How are we doing?" It gives the board a chance to reflect on how it contributes to the club and to consider how to strengthen the way in which it operates. A quick start on this process is for the board to complete the [Board Self-Assessment](#).