



# Board Evaluation – A quick guide

A high-performing board doesn't happen by chance—it requires regular reflection, assessment, and a commitment to continuous learning. Regular independent board evaluations are crucial in strengthening governance, fostering cohesion, and ensuring directors have the right skills and oversight to lead effectively.

A board evaluation can assess your board's leadership and purpose, decision-making, oversight, culture and behaviour, board operations and any specific areas your board would like to address. This will help you clearly identify how and where to improve your board's performance and capability and can support succession planning discussions.

We have created this quick guide to help you consider the key aspects of a board evaluation to ensure it delivers real value to your board.

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## Define your objectives

A successful board evaluation begins with setting specific objectives that align with the strategic goals of the board and the broader mission of the organisation.

## Determine your scope

Some boards may opt for a full board and chair review, while others might opt to also include a spotlight on committee effectiveness.

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## Evaluation methodology

From standard to tailored question sets and recommendations, to conducting the evaluation internally or seeking independent advice, it is important to choose the option that is right for your board.

## Implementation

Create an action plan for the implementation of suggested improvements at board level and development plans for individual directors.

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## Monitor and measure

Post implementation it is important to monitor, measure and acknowledge progress through ongoing professional development and regular evaluations.

“Systematic review of the performance of individual directors (including the chair) and of the board as a whole helps address weaknesses, increases skill levels and demonstrates a commitment to accountability.”

Institute of Directors (IoD) Code of Practice

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### 1. Objectives: How can our board perform better?

A board evaluation will provide meaningful insights into how the board operates, collaborates, and adds value. Key focus areas include:

- Better alignment with strategic goals
- Information flows, reporting & decision-making
- Board oversight of organisational practices & internal controls
- Board culture & behaviour
- Board structure & practices
- Inclusiveness & diversity
- Board/management relationship
- Director skills & competencies

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### 2. Scope: How broad do we want to go?

The scope of the evaluation will depend on what the board wants to achieve:

- Full board
- Chair evaluation
- Individual directors
- Committees
- Committee chairs
- Independent/Advisory directors

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### 3. Methodology: What is the best approach?

Selecting the right evaluation method ensures the process is effective and fit for purpose. Consider the following:

- Standard or Tailored evaluation questions?
- Directors' self-evaluation?
- Stakeholder feedback from management and key stakeholders?

- Standard or tailored recommendations?
- Board-only or a facilitated discussion?
- Regular or stand alone board meeting?
- Conduct the evaluation internally or seek independent advice/guidance?

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### 4. Implement: How do we get the most out of the process?

Once the evaluation is complete, acting on the findings is essential. Key steps include:

- Acknowledge strengths & areas for improvement
- Review & discuss recommendations
- Agree on board actions
- Create development plans for individual directors
- Identify and consider additional director training, board appointments, or fee reviews to address improvement areas

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### 5. Monitor: How do we track progress?

A board evaluation isn't just a one-off exercise—it should be part of a continuous improvement cycle:

- Monitor action items to track progress on agreed actions and governance improvements
- Regularly schedule evaluations to measure progress and adjust governance practices as needed
- Ongoing professional development and advice

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If you're thinking about a board evaluation and would like some guidance, our [governance advisors](#) or [board evaluation specialist](#) are here to help.

The IoD offers a range of [board evaluation solutions](#), from automated reports to tailored comprehensive advice, all designed to support your board's effectiveness and purpose. Our evaluation tools are based on the Four Pillars of Governance Best Practice and shaped by the experience and insights of New Zealand's governance community.

If you'd like to talk through your next steps, get in touch—we are here to help.