

[◀ Back to Free Resources](#)[↓ Download PDF](#)

## How effective are you as a trustee?

How does your performance compare to these typical expectations of trustees on a board?

On a scale of 1-5 – with 5 being highest – please circle how you rate your own performance compared to each expectation. Please comment where noted. The Board Chair will prepare a grid that summarizes trustee activity for questions #4, 5, 6, 9 and 10. Contribution amounts will not be listed.

Thank you.

---

**1. Demonstrate belief in and actively advocate for the values, mission and vision of the organization.**

– Please give an example.

1 2 3 4 5

**2. Work cooperatively with fellow trustees to fulfill obligations of trusteeship articulated in Board job description and in these performance expectations.**

– Please give an example.

1 2 3 4 5

**3. Act in ways that contribute to the effective operation of the Board of Trustees, including but not limited to: focus on what's good for the organization not your personal opinion or agenda and support board decisions once made.**

– Please give an example.

1 2 3 4 5

- 4. Prepare for and regularly attend and participate in board meetings.**

1 2 3 4 5

- 5. Serve on a committee, prepare for and regularly attend and participate in committee meetings.**

1 2 3 4 5

- 6. Participate in organizational activities such as special programs and fund-raising events.**

1 2 3 4 5

- 7. Reach out to diverse constituencies and help identify and cultivate relationships to support the organization as donors, volunteers and advocates.**

– Please give an example.

1 2 3 4 5

- 8. Use your personal and professional contacts and expertise for the benefit of the organization.**

– Please give an example.

1 2 3 4 5

- 9. Give an annual financial contribution to the best of your personal ability.**

1 2 3 4 5

- 10. If the organization launches a capital program, contribute to that also.**

1 2 3 4 5

- 11. Help raise charitable contributions to support the organization.**

– Please give an example.

1 2 3 4 5

12. Inform the Board of any potential conflicts of interest that you may have, whether real or perceived, and abide by the decision of the Board related to this situation.

– Please give an example.

1 2 3 4 5

---

***Reflection***

---

What are you most proud of that the Board of Trustees accomplished this year?

What is the most important thing that you think the Board of Trustees should work on next year?

What are you most proud about your work as a Trustee this past year?

What is your personal goal as a Trustee for next year?



Start Transforming  
**Your** Board Today ...

“ Membership has been well structured and cohesive.”

Shereem Herndon-Brown  
La Cima Charter School

“ My Board Chair shares articles from **BoardOnTrack** conference table. I know how Trustees work to take

Will Gardner, Founder & CEO  
Alma del Mar Charter School



**MEMBERSHIP**

- Board Membership
- Free Consultation

**RESOURCES**

- Tools
- Articles
- Presentations
- Board Meetings Guide
- Board Structure Guide

**COMMUNITY**

- Our Members
- Our Partners

[Case Studies](#)

## CONTACT

[Contact Us](#)

[About BoardOnTrack](#)

[Meet Our Team](#)

[Join Our Team](#)

[Letter from the Founder](#)

[LOGIN](#)

[FREE CONSULTATION](#)

[JOIN OUR MAILING LIST](#)



[844-BOT-TEAM \(844-268-8326\)](tel:844-BOT-TEAM)



[info@boardontrack.com](mailto:info@boardontrack.com)