

BOARD SELF-ASSESSMENT QUESTIONNAIRE*

| PART A—BOARD DEMOGRAPHICS | |
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| 1. What is the name of your synagogue? | |
| 2. What is your gender? | <input type="radio"/> Male <input type="radio"/> Female |
| 3. How old are you? | <input type="radio"/> Under 20 <input type="radio"/> 45 - 49 <input type="radio"/> 20 – 24 <input type="radio"/> 50 - 54 <input type="radio"/> 25 – 29 <input type="radio"/> 55 - 59 <input type="radio"/> 30 – 34 <input type="radio"/> 60 – 64 <input type="radio"/> 35 – 39 <input type="radio"/> 65 - 69 <input type="radio"/> 40 – 44 <input type="radio"/> 70 + |
| 4. Which of the following best represents the highest level of your <i>formal</i> education? | <input type="radio"/> Some high school or less <input type="radio"/> High school graduation <input type="radio"/> Attended some college <input type="radio"/> Associates degree <input type="radio"/> Bachelors degree <input type="radio"/> Masters degree <input type="radio"/> Doctorate |
| 5. What is your current employment status? | <input type="radio"/> Unemployed <input type="radio"/> Working part-time <input type="radio"/> Working full-time <input type="radio"/> Self-employed <input type="radio"/> Disabled <input type="radio"/> Retired |
| 6. Which of the following best describes your <i>total household income before taxes</i> last year? | <input type="radio"/> Under \$10,000 <input type="radio"/> \$10,000 – 19,999 <input type="radio"/> \$20,000 - \$29,999 <input type="radio"/> \$30,000 - \$39,999 <input type="radio"/> \$40,000 - \$49,999 <input type="radio"/> \$50,000 - \$59,999 <input type="radio"/> \$60,000 - \$69,000 <input type="radio"/> \$70,000 - \$79,999 <input type="radio"/> \$80,000 - \$89,999 <input type="radio"/> \$90,000 - \$99,999 <input type="radio"/> \$100,000 + |
| 7. What is your marital status? | <input type="radio"/> Single <input type="radio"/> Married or living with partner <input type="radio"/> Widowed |
| 8. What are the age ranges of children in your <i>immediate</i> household? (Choose all that apply.) | <input type="radio"/> Under age 6 <input type="radio"/> Aged 6 - 12 <input type="radio"/> Aged 13 - 18 <input type="radio"/> None under 18 in household |
| 9. How long have you been a member of your congregation? | <input type="radio"/> Less than 1 year <input type="radio"/> 1-2 years <input type="radio"/> 3-4 years <input type="radio"/> 5-9 years <input type="radio"/> 10-19 years <input type="radio"/> 20+ years |

* Basic instrument originally developed by the Center for Higher Education Governance and Leadership, University of Maryland at College Park, subsequently modified by Holland, Blackmon & Associates, and substantially updated and expanded by Gather the People.

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| 10. Which of the following best represents your <i>primary</i> reason for becoming a member of your congregation? (Choose one only.) | <input type="radio"/> Spiritual/Religious <input type="radio"/> Family tradition <input type="radio"/> Bar or bat mitzvah <input type="radio"/> Preference of spouse <input type="radio"/> Social <input type="radio"/> Cultural <input type="radio"/> Political/Economic <input type="radio"/> Other |
| 11. Which of the following best represents the distance in miles from your home to the synagogue? | <input type="radio"/> Less than 1 mile <input type="radio"/> 1-2 miles <input type="radio"/> 3-4 miles <input type="radio"/> 5-9 miles <input type="radio"/> 10-19 miles <input type="radio"/> 20+ miles |
| 12. How long have you been a member of your congregation's board of directors? | <input type="radio"/> Less than 1 year <input type="radio"/> 1-2 years <input type="radio"/> 3-4 years <input type="radio"/> 5-9 years <input type="radio"/> 10-19 years <input type="radio"/> 20+ years |
| 13. Do you read Hebrew? | <input type="radio"/> Do not read Hebrew <input type="radio"/> Read Hebrew <i>without</i> comprehension <input type="radio"/> Read Hebrew <i>with</i> comprehension |
| 14. Have you celebrated your bar or bat mitzvah? | <input type="radio"/> Yes <input type="radio"/> No |
| 15. How often do you typically attend religious services (at your synagogue or any other)? | <input type="radio"/> Daily <input type="radio"/> Several times a week <input type="radio"/> Once a week <input type="radio"/> Every few weeks <input type="radio"/> Once a month <input type="radio"/> Every few months <input type="radio"/> Once or twice a year <input type="radio"/> Less than once a year |
| 16. Which of the following best represents the number of years of <i>formal</i> Jewish education that you have had? | <input type="radio"/> None <input type="radio"/> Less than 1 year <input type="radio"/> 1 – 2 years <input type="radio"/> 3 – 4 years <input type="radio"/> 5 – 9 years <input type="radio"/> 10 + years |
| 17. Do you contribute financially to your synagogue over and over and above regular dues and, if so, typically in what <i>monthly</i> amount when averaged annually? | <input type="radio"/> Don't contribute above dues <input type="radio"/> Less than \$50/month <input type="radio"/> \$50-\$99/month <input type="radio"/> \$100-\$299/month <input type="radio"/> \$300-\$499/month <input type="radio"/> \$500-\$699/month <input type="radio"/> \$700-\$999/month <input type="radio"/> \$1000/month or more |
| 18. What, if anything, do you imagine would motivate you to make a larger financial contribution to your synagogue? | |

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| 19. Which of the following best describes the number of hours <i>monthly</i> that you are involved in synagogue activities? | <input type="radio"/> Less than 1 <input type="radio"/> 2 - 4 <input type="radio"/> 5 - 9 <input type="radio"/> 10 - 19 <input type="radio"/> 20 - 29 <input type="radio"/> 30 -39 <input type="radio"/> 40 + |
| 20. Approximately how many people attend Friday evening services at your synagogue? | |
| 21. Approximately how many people attend Shabbat morning services at your synagogue? | |

PART B—BOARD FUNCTIONING

| <i>Please check one answer box for each statement, indicating your disagreement or agreement with the statement.</i> | ←Disagree | Agree→ |
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| 1. Our board takes regular steps to keep informed about important trends in the larger community that might affect the congregation. | | |
| 2. I have participated in board discussions about what we should do differently as a result of a mistake the board made. | | |
| 3. I have had conversations with other members of our board regarding common interests we share outside of this congregation. | | |
| 4. I have been in board meetings where it seemed that the subtleties of the issues we dealt with escaped the awareness of several members. | | |
| 5. Our board explicitly examines the downside or possible pitfalls of any important decision it is about to make. | | |
| 6. Orientation programs for our new board members specifically include a segment about the congregation's history and traditions. | | |
| 7. Our board is more involved in resolving crises than in preparing for the future. | | |
| 8. Our board sets clear organizational priorities for the year ahead. | | |
| 9. Our board communicates its decisions to all those who are affected by them. | | |
| 10. At least once every two years, our board has a retreat or special session to examine our performance, how well we are doing as a board. | | |
| 11. Our board, to avoid antagonizing one of its own members, has on occasion failed to take action on a critical problem threatening the congregation or one of its programs or activities. | | |
| 12. In discussing key issues, it is not unusual for someone on our board to talk about what our congregation stands for and how that is related to the matter at hand. | | |
| 13. Values are seldom discussed explicitly at our board meetings. | | |
| 14. If our board thinks that an important group or constituency is likely to disagree with an action we are considering, we take time to learn their thoughts and feelings before we decide to act. | | |
| 15. Differences of opinion in our board's decision-making are more often settled by vote than by more discussion. | | |
| 16. Our board often delays action until an issue becomes urgent or critical. | | |
| 17. Our board periodically sets aside time to learn more about important issues facing congregations like the one we govern. | | |
| 18. I can recall an occasion when our board acknowledged its responsibility for an ill-advised decision. | | |
| 19. Our board has formed ad hoc committees or task forces that included staff as well as board members. | | |
| 20. Our board is as attentive to <i>how</i> it reaches conclusions as it is to <i>what</i> is decided. | | |

| <i>Please check one answer box for each statement, indicating your disagreement or agreement with the statement.</i> | ←Disagree Agree→ | | | |
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| 21. Most people on our board tend to rely on observation and informal discussions to learn about their role and responsibilities. | | | | |
| 22. I find it easy to identify the key issues that our board faces. | | | | |
| 23. When faced with an important issue, our board often brainstorms and tries to generate a whole list of creative approaches or solutions to the problem. | | | | |
| 24. When a new member joins our board, we make sure that someone serves as a mentor to help this person learn the ropes. | | | | |
| 25. I have been in many board meetings where explicit attention was given to the concerns of the congregational community. | | | | |
| 26. I have participated in board discussions about the effectiveness of our performance. | | | | |
| 27. At our board meetings, there is at least as much dialogue among members as there is between members and staff. | | | | |
| 28. Our board has developed a strategic vision and plan, and its ongoing decisions reflect frequent references to the plan. | | | | |
| 29. I have participated in discussions with new members about the roles and responsibilities of a board member. | | | | |
| 30. Our board has made a key decision that I believe to be inconsistent with the mission of this congregation. | | | | |
| 31. The leadership of our board typically goes out of its way to make sure that all members have the same information on important issues. | | | | |
| 32. Our board has adopted some explicit goals for itself, distinct from goals it has for the total congregation. | | | | |
| 33. Our board periodically requests information on the morale of the professional staff and acts promptly to ameliorate problems when they are identified. | | | | |
| 34. I have participated in board discussions about what we can learn from a mistake we have made. | | | | |
| 35. Our board meetings tend to focus more on current concerns, often micro-managing, than on preparing for the future. | | | | |
| 36. At least once a year, our board asks the most senior staff person to articulate his or her vision and strategy for the congregation's future. | | | | |
| 37. I have been present in board meetings where discussions of the history and mission of the congregation were key factors in reaching a conclusion on a problem. | | | | |
| 38. I have never received feedback on my performance as a member of this board. | | | | |
| 39. It is apparent from the comments of some of our board members that they do not understand the mission of the congregation very well. | | | | |
| 40. Our board has on occasion evaded responsibility for some important issues facing the congregation. | | | | |
| 41. Members of our board often are unfamiliar with the essential knowledge and experience that drives the congregation and are not regular participants in its activities. | | | | |
| 42. There have been occasions when our board has acted in ways inconsistent with the congregation's deepest values. | | | | |
| 43. Our board relies on the natural emergence of leaders, rather than trying explicitly to cultivate future leaders for the board. | | | | |
| 44. Our board often discusses where the congregation should be headed five or more years into the future. | | | | |
| 45. New members are provided with a detailed explanation of this congregation's mission when they join this board. | | | | |

| <i>Please check one answer box for each statement, indicating your disagreement or agreement with the statement.</i> | ←Disagree Agree→ | | | |
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| 46. Our board does not allocate congregational funds for the purpose of board education and development. | | | | |
| 47. Recommendations from the staff are usually accepted with little questioning in our board meetings. | | | | |
| 48. At times our board has appeared unaware of the impact its decisions will have on the congregational community it serves. | | | | |
| 49. Within the past year, our board has reviewed the congregation's strategies for attaining its long-term goals. | | | | |
| 50. Our board reviews the congregation's mission at least once every five years. | | | | |
| 51. Our board has conducted an explicit examination of its roles and responsibilities. | | | | |
| 52. I am able to speak my mind on key issues without fear of being ostracized by some members of our board. | | | | |
| 53. This board avoids issues that are ambiguous and complicated. | | | | |
| 54. The staff rarely reports to the board on the concerns of those the congregation serves. | | | | |
| 55. I have been in board meetings where the discussion focused on identifying or overcoming the congregation's weaknesses. | | | | |
| 56. One of the reasons I joined our board was that I believe strongly in the values of this congregation. | | | | |
| 57. Our board formally or informally recognizes special events in the lives of its members. | | | | |
| 58. This board discusses events and trends in the larger community that may present specific opportunities for this congregation. | | | | |
| 59. Former members of our board participate in events designed to convey to new members the congregation's history and values. | | | | |
| 60. Our board provides biographical information that helps members get to know one another better. | | | | |
| 61. Our board seeks information, critical feedback, and advice from leaders of other, similar congregations. | | | | |
| 62. Our board makes explicit use of the long-range priorities of this congregation in dealing with current issues. | | | | |
| 63. Our board understands and respects the norms of the professionals employed by this congregation. | | | | |
| 64. Members of our board seldom attend and support other activities and events sponsored by this congregation, such as Shabbat services and holiday activities. | | | | |
| 65. More than half of our board's time is spent in discussions of issues of importance to the congregation's long-range future. | | | | |
| 66. Members of our board, as leaders of the congregation, tend to see their roles as limited to attending board meetings that are primarily devoted to policy-making. | | | | |
| 67. Members of our board who are disrespectful or unkind to others with whom they disagree are typically not approached publicly or privately about their behavior. | | | | |
| 68. Our board has consciously worked out processes for dealing with members who deadweight its process or engage in destructive forms of participation. | | | | |
| 69. Our board allows itself to become "triangulated" between members of the congregation and the congregation's staff when tensions exist between them—inappropriately assuming responsibility for resolving relationship conflicts that do not concern the board directly. | | | | |
| 70. Our board recognizes the importance of mentoring informal leaders who have followings and who are behavioral models. | | | | |

| <i>Please check one answer box for each statement, indicating your disagreement or agreement with the statement.</i> | ←Disagree Agree→ | | | |
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| 71. When recruited to our board, members are given realistic expectations of the responsibilities and demands of the position. | | | | |
| 72. Members of our board often do not actually represent members of the congregation in any meaningful sense, but tend to promote and vote for their personal preferences. | | | | |
| 73. Our board has approved an effective outreach and public relations strategy to increase congregational membership. | | | | |
| 74. Our board has an adequate range of expertise to make it an effective governing body. | | | | |
| 75. Meeting notices, background documents, and proposed motions and resolutions of our board are distributed in a timely manner. | | | | |
| 76. There is an current file of board minutes, policies, resolutions, and amendments, which is available to congregational members. | | | | |
| 77. Our board members understand their legal obligations and moral responsibilities and liabilities in relation to the congregation's operations and employee contracts. | | | | |
| 78. Our board members have developed a team culture and work well together, handling conflict openly and constructively, with care and deference. | | | | |
| 79. Our board understands the high-risk areas that could have a significant impact on the congregation, such as recruiting and retaining members and staff, and appropriate policies and procedures are in place to minimize vulnerability? | | | | |
| 80. Our board has adopted and implemented a process to ensure that it is following its own strategic plan, policies, and procedures. | | | | |
| 81. As a member of our board, I have read the congregation's by-laws, policies, procedures, and employee contracts. | | | | |
| 82. I and other members of the board feel free to speak publicly for the congregation without a mandate or directions to do so. | | | | |
| 83. My usual preparation for board meetings includes reading materials circulated for the meeting. | | | | |
| 84. My usual preparation for board meetings includes inquiry or informal research of some kind to better prepare myself. | | | | |
| 85. My usual preparation for board meetings includes informal talk with other members of the board and members of the congregation to better prepare myself. | | | | |
| 86. Our board has worked to adopt policies and programs to ensure that prospective members of the congregation are "plugged in," that is, made to feel welcome and valued. | | | | |
| 87. Our board has fostered programs and activities that are responsive and relevant to the day-to-day pressures and hopes of the congregation's members. | | | | |
| 88. Our board recognizes and responds to the importance of supporting the faith-life of the congregation's members. | | | | |
| 89. Our board recognizes and responds to the importance of playing constructive role in the surrounding community. | | | | |
| 90. Our board's expectations for the performance of paid staff and volunteers are reasonable, clear, and widely understood. | | | | |
| 91. Our board supports the development of policies and programs to strengthen and unify the congregation as a community. | | | | |
| 92. Virtually all of our board members typically arrive and start board meetings on time. | | | | |
| 93. When someone is wasting everyone's time in our board meetings, one of the members speaks up to get the discussion on track. | | | | |

| <i>Please check one answer box for each statement, indicating your disagreement or agreement with the statement.</i> | ←Disagree Agree→ | | | |
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| 94. Members of our board who chair committees typically take the time needed to recruit a sufficient number of committee members and to involve them in the work that needs to be accomplished. | | | | |
| 95. Members of our board are active in much of the life of the congregation and have many relationships with other members. | | | | |
| 96. Most of our board members have a good Jewish education. | | | | |
| 97. Our board articulates the mission of the congregation to staff, leaders, and members. | | | | |
| 98. Our board conducts an overall evaluation of the strengths and weakness of contributions to the life of the congregation by the board itself, congregational officers, staff, and leaders, committees, teachers and school staff, etc., at least once every three years. | | | | |
| 99. Our board conducts an annual performance review of professional staff against their job descriptions and the congregation's mission. | | | | |
| 100. Our board does not support calculated risk-taking by professional staff, even when to build membership and participation. | | | | |
| 101. The staff members in our congregation have viable, non-threatening channels to give candid feedback to the officers and the board on their performance. | | | | |
| 102. Our board has provided budgetary and policy support for effective use of technology. | | | | |
| 103. Our congregation has a web site that is attractive and promoted to prospective new members, and effective for keeping current members informed and up to date. | | | | |
| 104. Our congregation's web site is a platform for our members to increase their Jewish learning and practice. | | | | |
| 105. All of our staff members and board members have e-mail and, whenever possible, e-mail is used to correspond and distribute announcements and newsletters. | | | | |
| 106. Our congregation—board, rabbi, leaders, staff, and many members—engages in interfaith activities in the larger community. | | | | |
| 107. Our board members do not engage in lashon hara (gossip) or rechilus (tale-bearing) at board meetings or at other congregational activities. | | | | |
| 108. Our members respect confidentiality. | | | | |
| 109. Our board meetings virtually always have a quorum and start and end on time. | | | | |
| 110. Our board invites the rabbi to present a Talmud Torah (Torah teaching) on a subject relevant to current board business or a challenge facing the board. | | | | |
| 111. Our board seeks out and relies on the opinions of outside experts when making decisions that involve specialized technical or professional knowledge. | | | | |
| 112. Our board uses the resources made available to us by national Jewish organizations, such as CAGE, the ADL, and our national movement (e.g., ALEPH, FRC, UAHF, USCJ, etc.). | | | | |
| 113. Our board does not adopt policy mandates or approve programs without allocating funds for staff to implement them. | | | | |
| 114. Our board recognizes the relationship between maintaining the vitality of the congregation's religious and spiritual life, and the viability of its financial health. | | | | |
| 115. Calls from our board to the membership to take some kind of action in support of the congregation, Israel, or the Jewish people receive a good response. | | | | |

| <i>Please check one answer box for each statement, indicating your disagreement or agreement with the statement.</i> | ←Disagree Agree→ | | | |
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| 116. Our board members and officers set a good example of participation in the week-to-week life of the congregation. | | | | |
| 117. Requests for board action by members of the congregation receive timely and appropriate responses. | | | | |
| 118. The officers who chair our board meetings remain neutral during controversial discussions and don't abuse the power of the chair by advocating a particular position. | | | | |
| Please add any comments you would like to make regarding your board or this survey. | | | | |

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