

Board member name Glenn Taylor

Calendar Year 2015 Best Practices Self-Assessment Guidance

Annually, board members are to self-evaluate their adherence to a set of best practices and report the percent of total best practices met by the board (percent of yes responses in the table below) in the *Annual Performance Progress Report* as specified in the agency Budget Instructions.

Recommended Assessment Process

1. Select a neutral party to facilitate the self-evaluation (recommended, not required).
2. Individual board members complete the score card shown below.
3. Tabulate the results for all board members (can be done by neutral party in advance).
4. Discuss the results—particularly the results for those areas where there are disparate responses or where the group agrees that they are not adhering to a best practice.
5. Record the group’s joint response to each best practice on a new score card. If consensus is not achieved, the board or commission should record the response as “no.”

Best Practices Assessment Score Card

Best Practices Criteria	Yes	No
1. Executive Director’s performance expectations are current.	✓	
2. Executive Director’s receives annual performance feedback.	✓	
3. The agency’s mission and high-level goals are current and applicable.	✓	
4. The board reviews the <i>Annual Performance Progress Report</i> .	✓	
5. The board is appropriately involved in review of agency’s key communications.	✓	
6. The board is appropriately involved in policy-making activities.	✓	
7. The agency’s policy option packages are aligned with their mission and goals.	✓	
8. The board reviews all proposed budgets.	✓	
9. The board periodically reviews key financial information and audit findings.	✓	
10. The board is appropriately accounting for resources.	✓	
11. The agency adheres to accounting rules and other relevant financial controls.	✓	
12. Board members act in accordance with their roles as public representatives.	✓	
13. The board coordinates with others where responsibilities and interests overlap.	✓	
14. The board members identify and attend appropriate training sessions.	✓	
15. The board reviews its management practices to ensure best practices are utilized.	✓	
16. Others [The board may add additional best practices; however, they are not to be counted when calculating the percentage adherence to best practices.]		
Total Number	15	
Percentage of Total	100%	

Analyzing Assessment Results and Defining Next Steps

Once the above table has been completed, the board will want to prepare responses to the following questions. Responses should be integrated into the *Annual Performance Progress Report*, which is due from agencies on September 30th of each year.

- How are we doing?
- How do we compare to others and/or to our target? (Once this data is available.)
- What factors are affecting our results?
- What needs to be done to improve future performance?

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Board member name Lisa Kouzes

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OREGON BOARD OF
CHIROPRACTIC EXAMINERS

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8. The board reviews all proposed budgets.	✓	
9. The board periodically reviews key financial information and audit findings.	✓	
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- How are we doing? well
- How do we compare to others and/or to our target? (Once this data is available.) - don't recall
- What factors are affecting our results? our awesomeness
- What needs to be done to improve future performance? policies in writing for everything. Fun!

Board member name P. Ron Romanick DC

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4. The board reviews the <i>Annual Performance Progress Report</i> .	X	
5. The board is appropriately involved in review of agency’s key communications.	X	
6. The board is appropriately involved in policy-making activities.	X	
7. The agency’s policy option packages are aligned with their mission and goals.	X	
8. The board reviews all proposed budgets.	X	
9. The board periodically reviews key financial information and audit findings.	X	
10. The board is appropriately accounting for resources.	X	
11. The agency adheres to accounting rules and other relevant financial controls.	X	
12. Board members act in accordance with their roles as public representatives.	X	
13. The board coordinates with others where responsibilities and interests overlap.	X	
14. The board members identify and attend appropriate training sessions.	X	
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Board member name Amber Reed

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5. The board is appropriately involved in review of agency’s key communications.	x	
6. The board is appropriately involved in policy-making activities.	x	
7. The agency’s policy option packages are aligned with their mission and goals.	x	
8. The board reviews all proposed budgets.	x	
9. The board periodically reviews key financial information and audit findings.	?	
10. The board is appropriately accounting for resources.	x	
11. The agency adheres to accounting rules and other relevant financial controls.	?	
12. Board members act in accordance with their roles as public representatives.	x	
13. The board coordinates with others where responsibilities and interests overlap.	x	
14. The board members identify and attend appropriate training sessions.	x	
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Board member name Franchesca Vermillion, DC

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