

BoardSource®

Org Name

CEO Evaluation Report

July 2022

Report summary

Self-assessment	Done
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Respondent statistics

Group	Completed responses	% complete
Board Members	17/17	100%

Compare the number of people who finished your assessment to the number of people invited to participate.

Report for

Introduction

By conducting an assessment, the chief executive has the opportunity to receive the needed insight into his or her strengths, limitations, and overall performance. The assessment of the chief executive is an opportunity for the board to express support for the executive and strengthen his or her performance in the future. The consequences of failing to assess the chief executive can lead to mistrust, strained working relationships, ongoing poor performance, and even turnover.

The survey uses a 5-point rating scale based on the following definitions:

- 1 - Unsatisfactory
- 2 - Needs Improvement
- 3 - Meets Expectations
- 4 - Exceeds Expectations
- 5 - Exceptional
- NA / Don't Know

Tips on how to interpret your results and determine action:

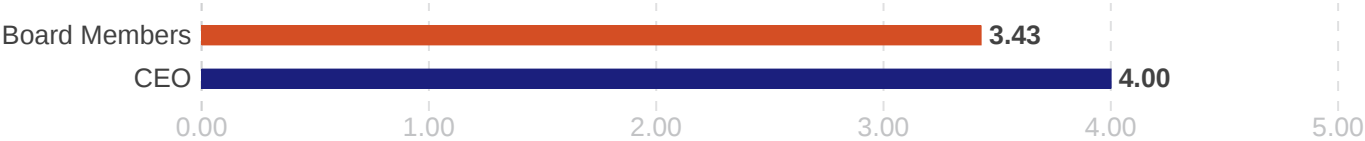
Do:	Don't:
<ul style="list-style-type: none">• Look at feedback holistically• Identify themes in strengths and opportunities for improvement• Prioritize a few focus areas to add to your development plan• Understand that everyone has opportunities for improvement	<ul style="list-style-type: none">• Try to figure out who said what• Focus on one positive or negative score/comment• Create a development plan around every item• Be discouraged that you have opportunities for improvement

This summary report is designed to guide the board and the chief executive through an effective dialogue. The goal of this dialogue is to provide insight into the board's perception of the chief executive's strengths, limitations, and overall performance and to foster the growth and development of the chief executive. This process is meant to be a learning experience and we believe it is only through discussion of this type that the chief executive and their board can chart a course of action and make progress in fulfilling the association's mission.

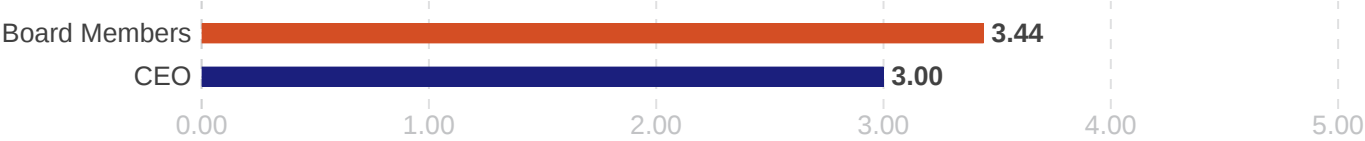
The scores from the chief executive appear in a separate column from those of the board in aggregate. By doing so, the board can compare its overall responses to those of the chief executive. Responses to the open-ended questions appear as they were entered.

Scoring Overview for

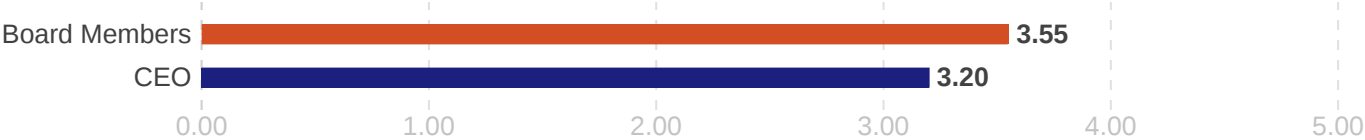
Administration



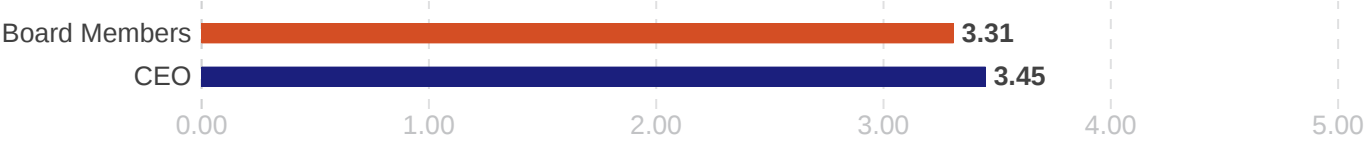
Communications and Advocacy



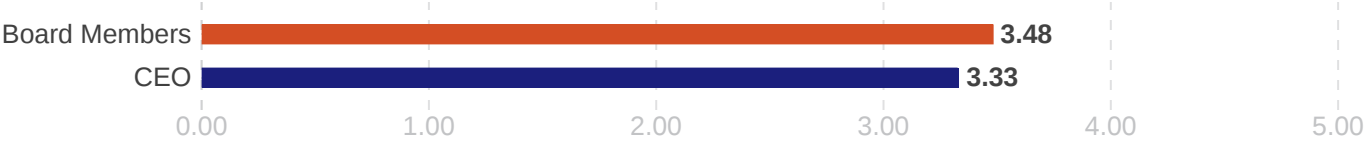
Financial Management



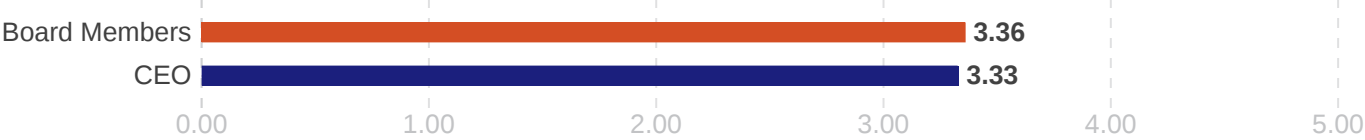
Goals



Governance and Board Relations



Interpersonal Skills



The gap chart displays the difference in scores between the Board Member's rating and the CEO's self-rating. For example, in the case of self-ratings vs. how Board Members rated the CEO, a positive(+) difference means others rated the CEO higher than the rating the CEO provided for themselves. A negative(-) difference means Board Members rated the CEO lower than the CEO provided for themselves.

Gap chart



The gap chart indicates the +/- difference between two rater groups.

The high/low chart displays items based on the areas where Board Members rated the CEO highest and lowest. The "Rank" number in the left column may be duplicated due to tied scores.

High and low scores

Highest scores

Rank	Scoring category	Item	Average
1	Strategic Thinking and Planning	2.1d Effectively led the organization in assessing and responding to changes in the association's environment	4.17
2	Leadership Skills	3.1g Courage and flexibility in leading during times of change	4.00
3	Leadership Skills	3.1d A willingness to ask difficult questions and challenge organizational assumptions	3.94
4	Leadership Skills	3.1e An awareness of trends and information in the external environment that may impact the association	3.88
4	Governance and Board Relations	2.3a Maintained an effective working relationship with the board, characterized by open communication, respect, and trust	3.88

Lowest scores

Rank	Scoring category	Item	Average
1	Goals		2.88
2	Governance and Board Relations	2.3f Worked to leverage the talent and expertise of individual board members	3.00
2	Goals		3.00
3	Goals		3.06
4	Staff Leadership and Management	2.3h Focused staff attention on issues of highest priority to the association	3.07

Hidden strengths shows where Board Members rated the CEO higher than the CEO rated themselves. Areas for improvement shows where Board Members rated the CEO lower than the CEO rated themselves. Both sections are ranked from largest to smallest gap. The "Rank" number in the left column may be duplicated due to tied scores.

Hidden strengths/Improvement areas

Hidden strengths

Rank	Scoring category	Item	CEO	Board Members	Gap
1	Governance and Board Relations	2.3f Worked to leverage the talent and expertise of individual board members	2.00	3.07	+1.07
2	Governance and Board Relations	2.3b Working with the board chair, focused board meetings on topics of highest priority that need board attention and involvement	3.00	3.88	+0.88
3	Strategic Thinking and Planning	2.1c Engaged the board and staff in a meaningful process to set priorities and develop a written strategic plan	3.00	3.79	+0.79
4	Leadership Skills	3.1h A strong sense of moral and ethical integrity	3.00	3.73	+0.73
5	Goals		3.00	3.67	+0.67
5	Financial Management	2.4d Implemented appropriate internal controls to protect the association from fraud and abuse	3.00	3.67	+0.67

Areas for improvement

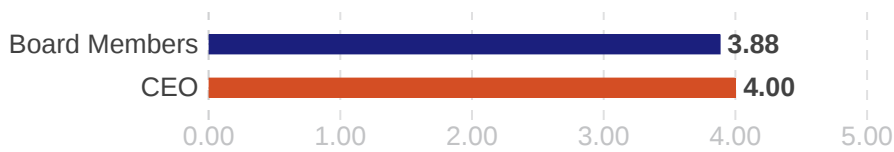
Rank	Scoring category	Item	CEO	Board Members	Gap
1	Goals		4.00	3.00	-1.00
2	Staff Leadership and Management	2.3i Served as an effective liaison between the board and staff	4.00	3.07	-0.93
3	Staff Leadership and Management	2.3g Maintained an effective working relationship with the staff, characterized by open communication, respect, and trust	4.00	3.08	-0.92
4	Goals		4.00	3.13	-0.88

2.3A Board Relations

(Average Overall Score For This Section: 3.47)

Together, the chief executive and the board form the leadership team of the association. Each arm of the team draws upon its own unique strengths and abilities. The chief executive and board have joint responsibility for developing and maintaining a strong working relationship and a system for sharing information that enables the board to effectively carry out its governance role.

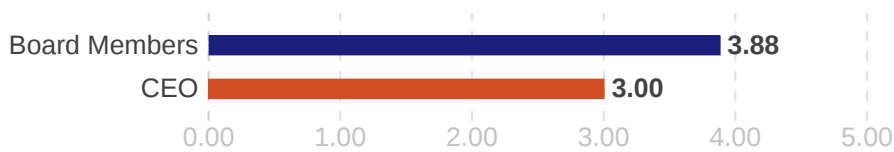
2.3a Maintained an effective working relationship with the board, characterized by open communication, respect, and trust



Recognized strength

CEO and Board Members agree this area is a top strength.

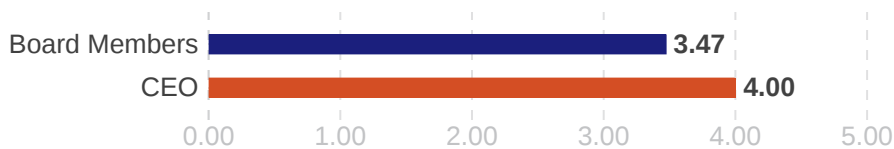
2.3b Working with the board chair, focused board meetings on topics of highest priority that need board attention and involvement



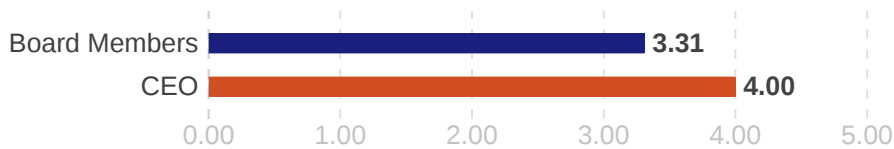
Unrecognized strength

There is discrepancy between the CEO's self-rating and the ratings from Board Members.

2.3c Provided board members with the appropriate information needed to support informed decision making and effective governance



2.3d Served as an effective liaison between board members and staff



Displayed below in this table is the percent of board members that selected a rating for each question in this section:

Field	Unsatisfactory	Needs Improvement	Meets Expectations	Exceeds Expectations	Exceptional	Total
2.3a Maintained an effective working relationship with the board, characterized by open communication, respect, and trust	0.00%	6.25%	25.00%	43.75%	25.00%	
2.3b Working with the board chair, focused board meetings on topics of highest priority that need board attention and involvement	0.00%	0.00%	37.50%	37.50%	25.00%	
2.3c Provided board members with the appropriate information needed to support informed decision making and effective governance	0.00%	11.76%	52.94%	11.76%	23.53%	
2.3d Served as an effective liaison between board members and staff	0.00%	12.50%	62.50%	6.25%	18.75%	

2.3A Do you have any specific comments about the chief executive's performance on this core competency?

Board Members

N/A

N/A

N/A

Section Four: Accomplishments and Challenges

While the quantitative ratings in the previous sections provide an important snapshot of the board's assessment of the chief executive in key areas of responsibility and performance, this section of the survey provides an opportunity to view thoughts and insights about the chief executive that cannot be captured in numeric scores.

Assessing the Past

The following questions consider the overall achievements of the chief executive over the past year and will serve as the foundation for discussion between the board and chief executive.

4.1 What were the most significant achievements of the chief executive in the past year?

Board Members

Planning for the Future

While the majority of the questions in this assessment focus on past performance, the final questions look to the future. These questions will assist the board and chief executive in establishing the executive's performance goals and priorities for the upcoming year.

In thinking about the year ahead . . .

4.4 What are the two most important organizational priorities for the chief executive?

Board Members

Next Steps

The partnership between the board and the executive leader is critically important to the success of an association. A strong and healthy board-staff partnership provides flexible and resilient leadership that contributes positively to the association's overall impact.

To get the most out of your assessment, BoardSource recommends taking the following steps:

1. Review and Analyze the Assessment Results
2. Discuss the Results with the Board
3. Review the Results with the Chief Executive and Develop an Action Plan
4. Support the Chief Executive's Future Development

Read more about each of these steps in detail here: [Using the Assessment of the Chief Executive Results](#).

Additional Resources

[Board Chair and Chief Executive Partnership](#)

[Executive Sessions](#)

[Five Tips for Chief Executives and Board Chairs Working to Build a Strong Partnership](#)

[Trouble at the Top: The Nonprofit Board's Guide to Managing an Imperfect Chief Executive](#) *(available for purchase)*

[Setting Goals for your CEO](#) *(members only)*

[Performance Expectations for the Chief Executive](#) *(members only)*

Deeper Support

Looking to go deeper? Consider investing in the Board Support Program, or reaching out to a consultant from our network.

Board Support Program

BoardSource's [Board Support Program](#) provides year-round governance guidance, resources, and leadership development to you, your board, and your organization. Key benefits include:

- Complimentary Assessment Product
- Access to the [BoardSource Exchange](#)
- On-demand [Certificate of Nonprofit Board Education](#)
- Ask-an-Expert Email Service
- Members-Only Downloadable & Written Resources

Consultant Directory

BoardSource knows that – many times – there is no replacement for direct support and guidance from a [knowledgeable board consultant](#). That's why BoardSource has built relationships with a broad network of consultants from across the country who bring a wide range of strengths and experiences working with nonprofit boards.

New to selecting a consultant, or need a little help getting started? Check out this resource page:

[Choosing a Consultant FAQ](#)

Contact Us

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Membership or General Inquiries: members@boardsource.org