Org Name

CEO Evaluation Report

July 2022

Report summary

Self-assessment	To do

Respondent statistics

Group	Completed responses	% complete
Board Members	1/16	6%

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 head of school has the opportunity to receive the needed insight into his or her strengths, limitations, and overall performance. The head of school assessment is an opportunity for the board to express support for the head and strengthen his or her performance in the future. The consequences of failing to assess the head of school 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

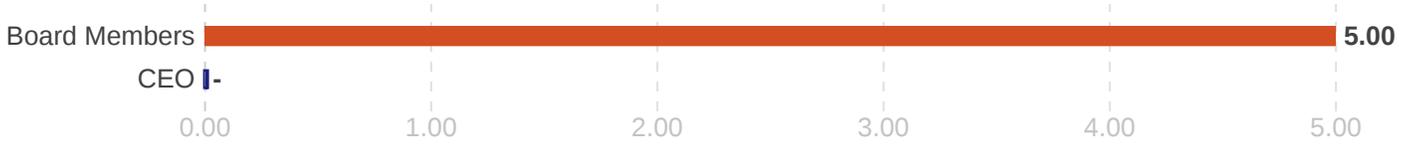Tips on how to interpret your results and determine action:

Do:

- 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

Don't:

- 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 head of school through an effective dialogue. The goal of this dialogue is to provide insight into the board's perception of the head's strengths, limitations, and overall performance and to foster the growth and development of the head of school. This process is meant to be a learning experience and we believe it is only through discussion of this type that the head of school and their board can chart a course of action and make progress in fulfilling the school's mission.
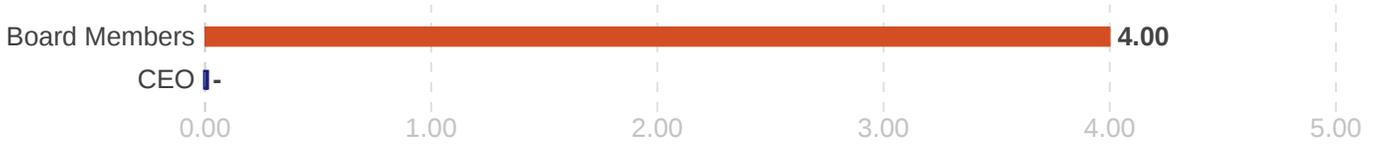
The scores from the head of school appear in a separate column from those of the board in aggregate. By doing so, the board can compare its overall responses to those of the head of school. Responses to the open-ended questions appear as they were entered.
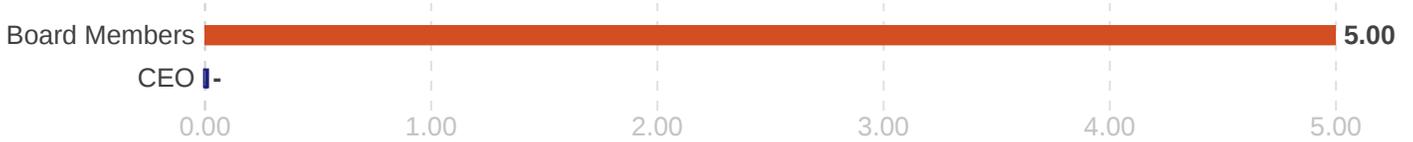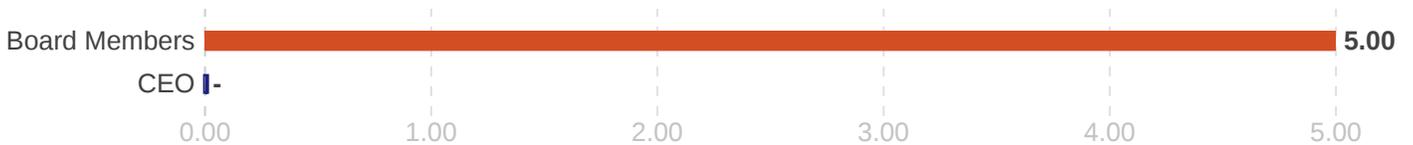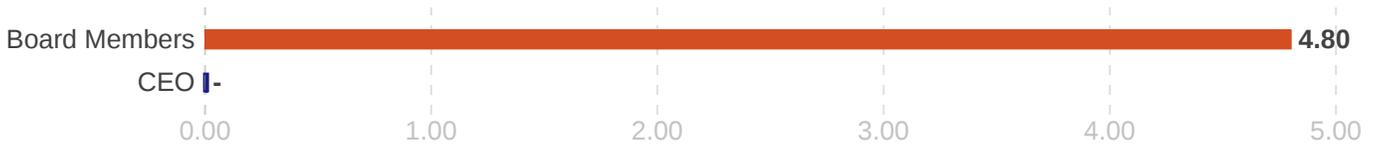
Scoring Overview for

Program Management

Board Members	5.00
CEO	-

0.00   1.00   2.00   3.00   4.00   5.00

Operations Management

Board Members	4.00
CEO	-

0.00   1.00   2.00   3.00   4.00   5.00

Head of School-Board Partnership

Board Members	5.00
CEO	-

0.00   1.00   2.00   3.00   4.00   5.00

Goals

Board Members	5.00
CEO	-

0.00   1.00   2.00   3.00   4.00   5.00

Fundraising and Resource Development

Board Members	4.80
CEO	-

0.00   1.00   2.00   3.00   4.00   5.00

Fiscal Management

Board Members	5.00
CEO	-

0.00   1.00   2.00   3.00   4.00   5.00
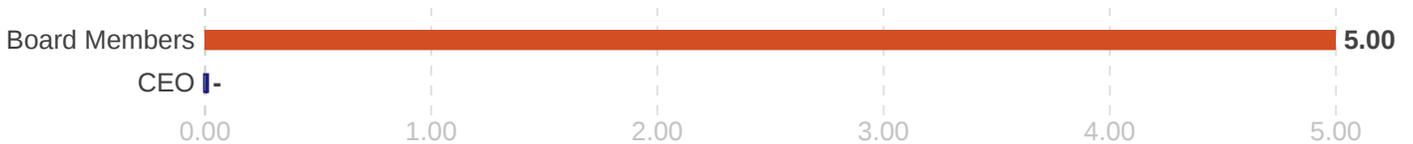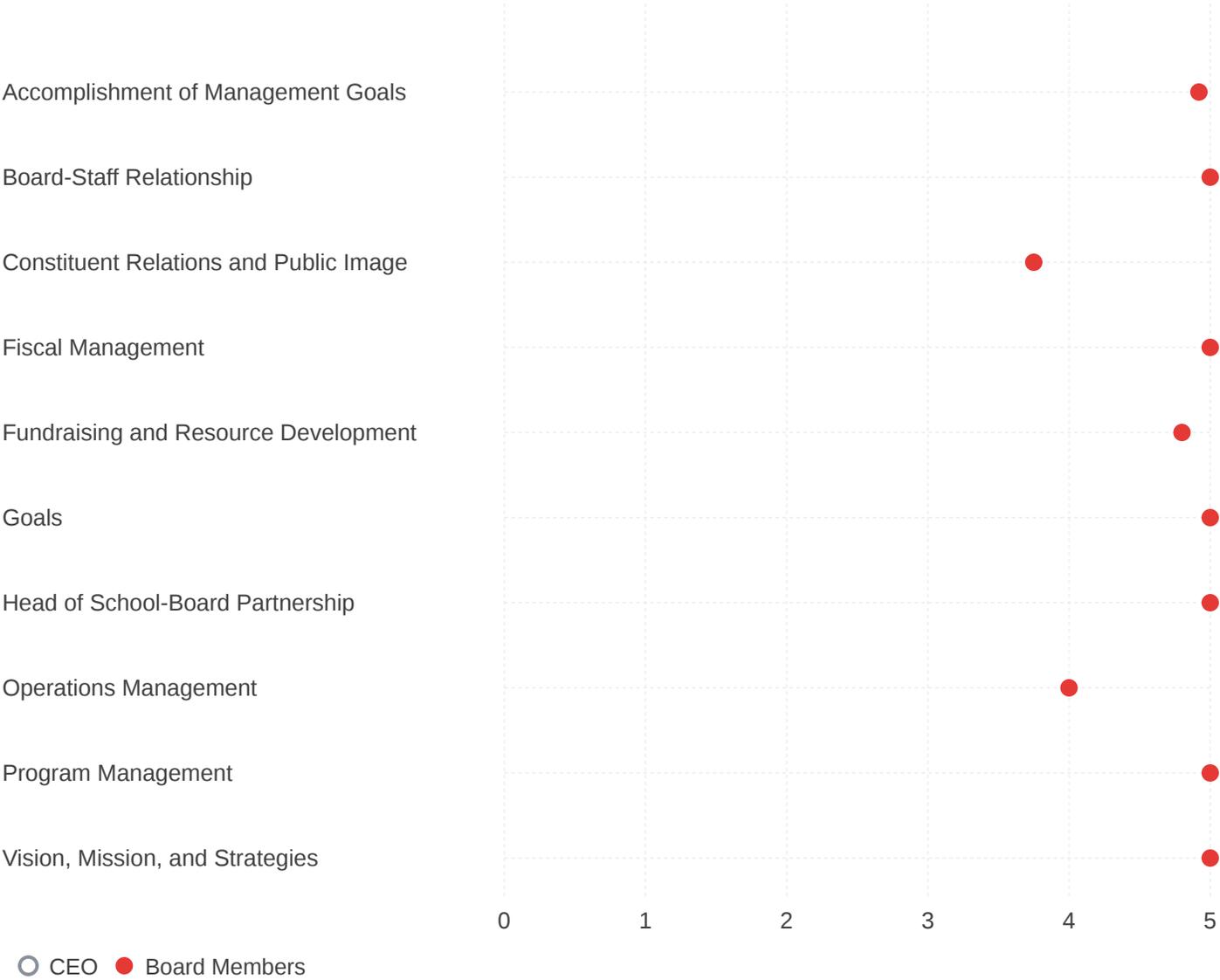
The gap chart displays the difference in scores between the Board Member's rating and the CEO's self-rating. For example, in the case of self-ratings vs. how Board Members rated the CEO, a positive(+) difference means others rated the CEO higher than the rating the CEO provided for themselves. A negative(-) difference means Board Members rated the CEO lower than the CEO provided for themselves.

Gap chart

Accomplishment of Management Goals	
Board-Staff Relationship	
Constituent Relations and Public Image	
Fiscal Management	
Fundraising and Resource Development	
Goals	
Head of School-Board Partnership	
Operations Management	
Program Management	
Vision, Mission, and Strategies	

0   1   2   3   4   5

○ CEO   ● Board Members

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.

High and low scores

Highest scores

| Rank	Scoring category	Item	Average
1	Vision, Mission, and Strategies	2.1 Has worked with the board to develop a clear vision for the school, and understands his or her own leadership role.	5.00
1	Vision, Mission, and Strategies	2.4 Has a sense of what must change and what must remain the same in order to accomplish the school's mission and realize its vision.	5.00
1	Vision, Mission, and Strategies	2.3 Has worked with the board and staff to create an effective process for long-range or strategic planning for the school.	5.00
1	Vision, Mission, and Strategies	2.2 Has worked with the board to translate the school's mission into realistic goals and objectives.	5.00
1	Constituent Relations and Public Image	10.4 Is well regarded by his or her professional peers in the independent school world.	5.00

Lowest scores

Rank	Scoring category	Item	Average
1	Fundraising and Resource Development	5.3 Is innovative in the creation of partnerships with businesses or other institutions that contribute to the school's resources.	4.00
1	Accomplishment of Management Goals	g. Media and others in the community	4.00
2	Accomplishment of Management Goals	3.1 Selects and cultivates qualified senior staff, models effective behaviors and skills, and builds morale among staff and volunteers.	5.00
2	Program Management	4.1 Demonstrates substantive knowledge regarding the organization's programs and services.	5.00
2	Program Management	4.2 Works with the board to develop appropriate policies to ensure the efficiency and effectiveness of programs.	5.00

# Section 5: Effectiveness in Fundraising and Resource Development

(Average Overall Score For This Section: 4.80)

The head is able to provide substantial leadership in this area by being able to clearly articulate the school's needs. The head of school and board use their combined strengths, knowledge, and relationships to help the school achieve its objectives.

5.1 Has a clear understanding of the current and future financial resources needed to realize the school's mission.
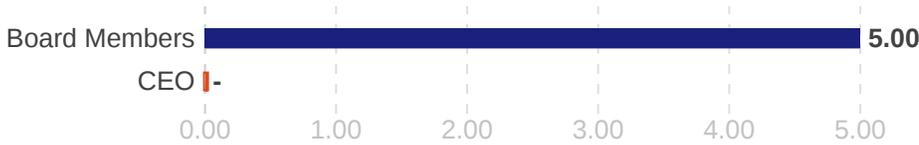

5.2 Works in concert with the board and development staff to implement a fundraising program that meets the goals established for the school.
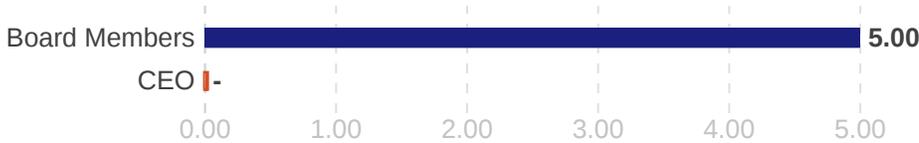

5.3 Is innovative in the creation of partnerships with businesses or other institutions that contribute to the school's resources.
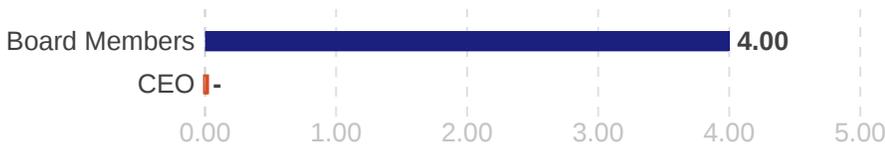
5.4 Guides revenue-generating activities in order to provide adequate income to the school.
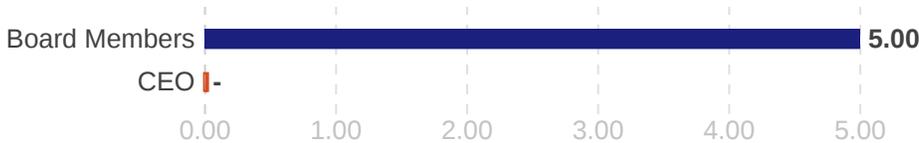
5.5 Is an effective fundraiser, working well with staff, donors, and board members to secure adequate income and strong personal commitments from those who have an interest in the school.
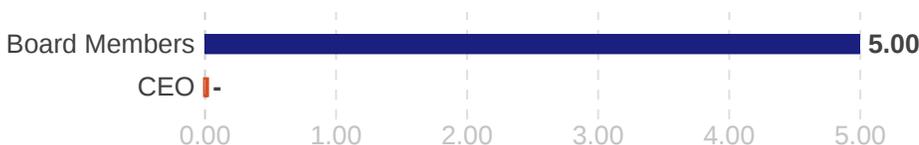
Displayed below in this table is the percent of board members that selected a rating for each question in this section:

					1 Responses	
Field	Unsatisfactory	Needs improvement	Meets expectations	Exceeds expectations	Exceptional	Total
5.1 Has a clear understanding of the current and future financial resources needed to realize the school's mission.	0.00%	0.00%	0.00%	0.00%	100.00%	
5.2 Works in concert with the board and development staff to implement a fundraising program that meets the goals established for the school.	0.00%	0.00%	0.00%	0.00%	100.00%	
5.3 Is innovative in the creation of partnerships with businesses or other institutions that contribute to the school's resources.	0.00%	0.00%	0.00%	100.00%	0.00%	
5.4 Guides revenue-generating activities in order to provide adequate income to the school.	0.00%	0.00%	0.00%	0.00%	100.00%	

5. What are the major strengths of the Head of School in this area? How can the Head of School improve in this area?

Board Members

N/A

Section 11: Open-Ended Questions

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 include thoughts and insights about the chief executive that cannot be captured in numeric scores.

1. What are the three major strengths of the head of school?

Board Members

ACE_Open2 - 2. What are some limitations in the head of school's performance?

Board Members

3. What have been the most significant achievements of the head of school over the past year?

Board Members

4. What external factors have influenced the head of school's performance?

Board Members

Next Steps

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

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

1. Tabulate and Analyze the Assessment Results
2. Discuss the Results with the Board
3. Review the Results with the Head of School and Develop an Action Plan
4. Support the Head of School'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

Assessments Questions: assessments@boardsource.org
Membership or General Inquiries: members@boardsource.org