

Org Name

CEO Evaluation Report

March 2023

Report summary

Self-assessment	Done
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Respondent statistics

Group	Completed responses	% complete
Board Members	1/1	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 - Excluded from Data Analysis

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:

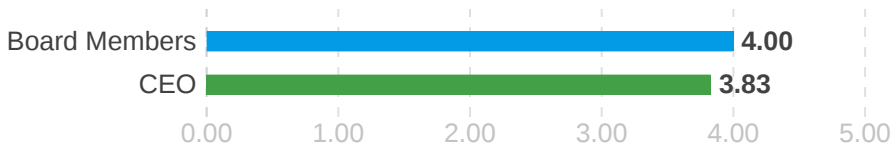
- Try to figure out who said what
- Focus on one positive or negative score/comment
- Create a development plan around every item
- Be discouraged that you have opportunities for improvement

This summary report is designed to guide the board and the 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. Each multiple choice question within the survey has the option to respond NA/Don't Know. NA/Don't Know responses will be excluded from the data analysis within this report. Due to this, the response count to some individual questions may appear less than the total number of completed surveys.

Scoring Overview for

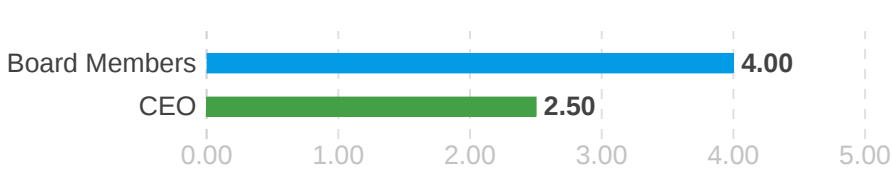
Administration



Recognized strength

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

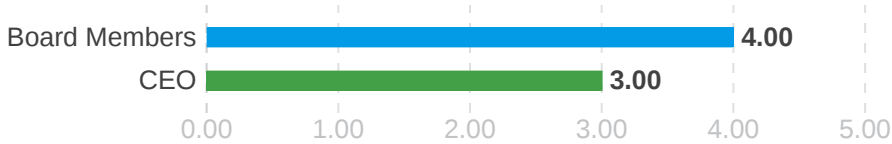
Communications and Advocacy



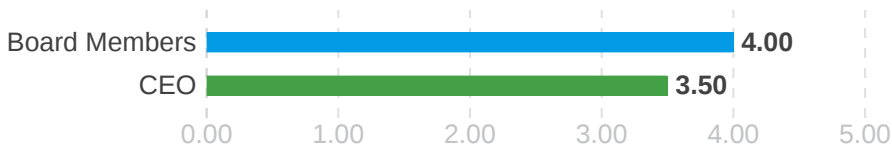
Unrecognized improvement area

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

Financial Management



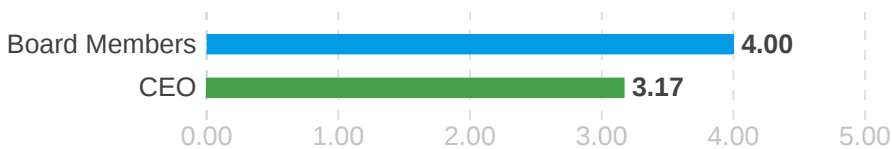
Goals



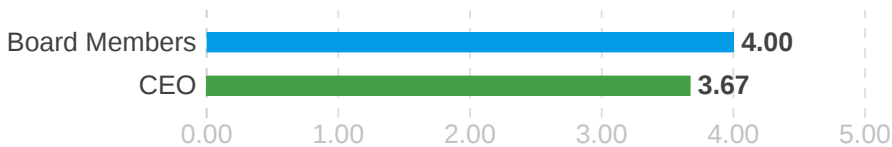
Recognized strength

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

Governance and Board Relations



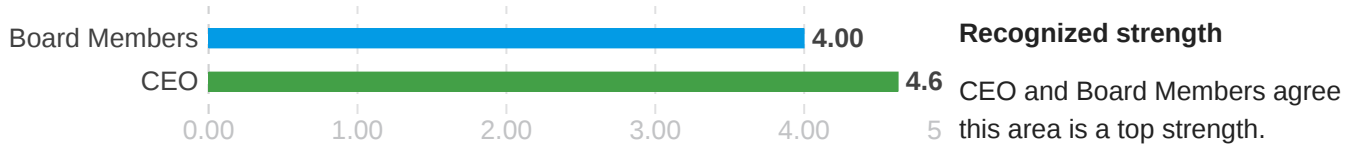
Interpersonal Skills



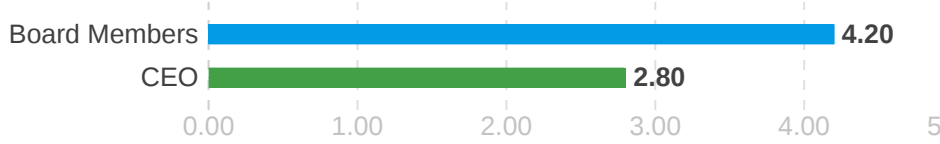
Recognized strength

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

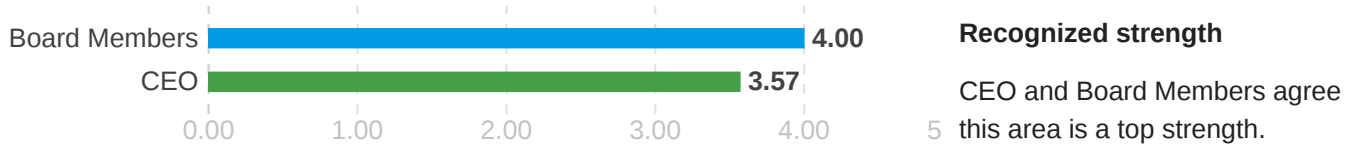
Leadership Skills



Staff Leadership and Management



Strategic Thinking and Planning



The gap chart below displays the difference in scores between the Board Member's rating and the CEO's self-rating in each overall section of the survey. 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



At the top of the chart below you will see where Board Members rated the CEO higher than the CEO rated themselves for individual questions within the survey. At the bottom half of the chart you will see where the Board Members rated the CEO lower than the CEO rated themselves for individual questions within the survey. Both sections are ranked from largest to smallest gap. The "Rank" number in the left column may be duplicated due to tied scores.

Top Response Gaps For Individual Questions

Board Rated Higher Than CEO

Rank	Scoring category	Item	CEO	Board Members	Gap
1	Staff Leadership and Management	2.3g Maintained an effective working relationship with the staff, characterized by open communication, respect, and trust	2.00	5.00	+3.00
1	Communications and Advocacy	2.5a Served as an articulate and effective spokesperson for the industry or profession	1.00	4.00	+3.00
1	Financial Management	2.4e Ensured sound financial stewardship of the association's contributions and organizational assets (excluding investments in the endowment)	1.00	4.00	+3.00
2	Staff Leadership and Management	2.3j Supported the professional development of staff	2.00	4.00	+2.00
2	Communications and Advocacy	2.5b Maintained an open dialogue with the association's members	2.00	4.00	+2.00
2	Financial Management	2.4d Implemented appropriate internal controls to protect the association from fraud and abuse	2.00	4.00	+2.00
2	Governance and Board Relations	2.3c Provided board members with the appropriate information needed to support informed decision making and effective governance	2.00	4.00	+2.00

CEO Rated Higher Than Board Rank

Rank	Scoring category	Item	CEO	Board Members	Gap
1	Administration	2.2a Displayed a thorough knowledge of the association's mission and programs	5.00	4.00	-1.00
1	Financial Management	2.4a Made sound financial decisions and recommendations based on a thorough understanding of the association's overall financial picture	5.00	4.00	-1.00

1	Leadership Skills	3.1a A clear commitment to the association's mission and values	5.00	4.00	-1.00
1	Leadership Skills	3.1b An ability to motivate and engage others in advancing the mission of the association	5.00	4.00	-1.00
1	Leadership Skills	3.1c An ability to learn from the successes and failures of the past in planning for the future	5.00	4.00	-1.00
1	Leadership Skills	3.1f A broker of ideas with the ability to facilitate visionary thinking throughout the organization	5.00	4.00	-1.00
1	Leadership Skills	3.1h A strong sense of moral and ethical integrity	5.00	4.00	-1.00

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	Staff Leadership and Management	2.3g Maintained an effective working relationship with the staff, characterized by open communication, respect, and trust	5.00
2	Strategic Thinking and Planning	2.1g Engaged board members, collectively and individually, to think strategically and adapt to changing needs	4.00
2	Strategic Thinking and Planning	2.1f Effectively led the staff in implementing the strategic plan and annual goals	4.00
2	Strategic Thinking and Planning	2.1e Oversaw the development of appropriate goals and objectives to advance the mission	4.00
2	Strategic Thinking and Planning	2.1d Effectively led the organization in assessing and responding to changes in the association's environment	4.00

Lowest scores

Rank	Scoring category	Item	Average
1	Administration	2.2a Displayed a thorough knowledge of the association's mission and programs	4.00
1	Administration	2.2b Oversaw the effective and efficient operation of the association	4.00
1	Administration	2.2c Managed the successful delivery of programs and services to members	4.00
1	Administration	2.2d Recruited, developed, and retained the staff needed to implement the annual work plan	4.00
1	Administration	2.2e Minimized risk by ensuring that appropriate and up-to-date organizational systems, policies, and procedures are in place	4.00

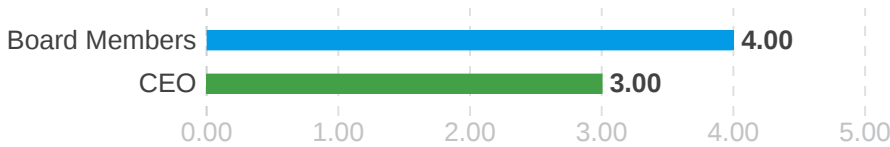
Section One: Annual Performance Goals

(Average Overall Score For This Section: 3.75)

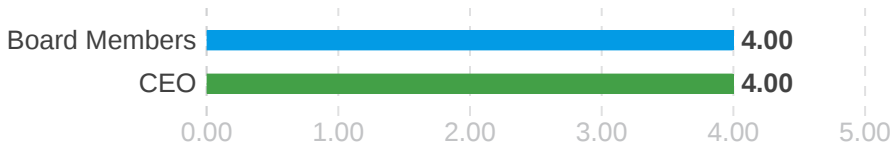
Annual performance goals help the chief executive set direction and priorities, and serve to clarify expectations between the board and the executive.

The chief executive's annual goals can focus on organizational priorities (e.g., increasing public awareness of the organization or doubling the membership), leadership tasks that the executive has been charged with (e.g., reorganizing a specific department in the organization or increasing the number of public appearances on behalf of the organization), or professional development goals (e.g., appropriately delegating responsibility to other staff or improving personal communication skills).

Click to write Statement 1



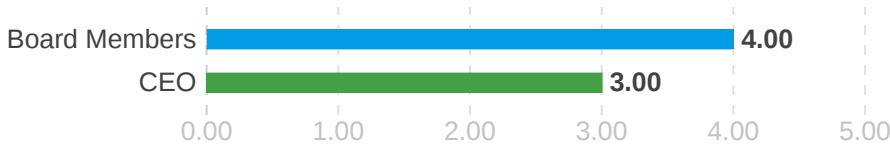
Click to write Statement 10



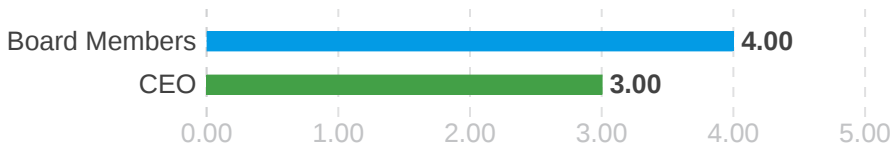
Recognized strength

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

Click to write Statement 2



Click to write Statement 3



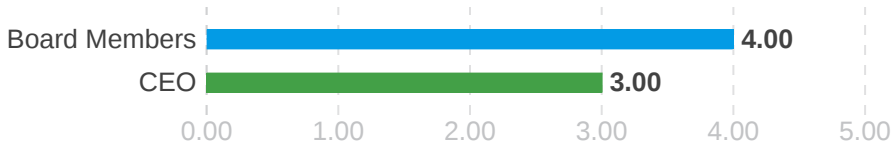
Click to write Statement 4



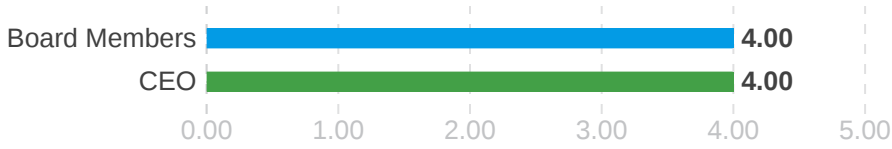
Recognized strength

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

Click to write Statement 5



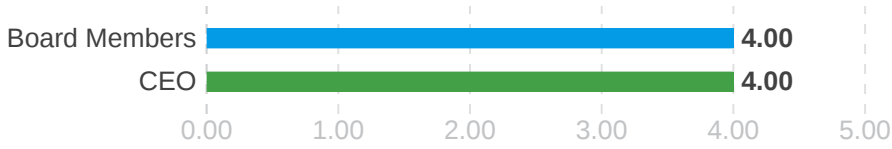
Click to write Statement 6



Recognized strength

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

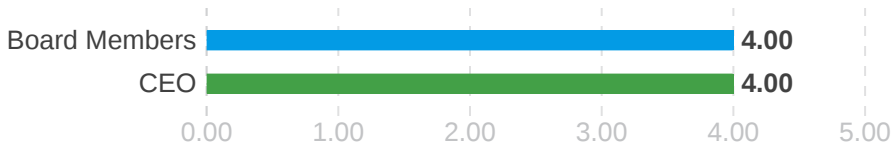
Click to write Statement 7



Recognized strength

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

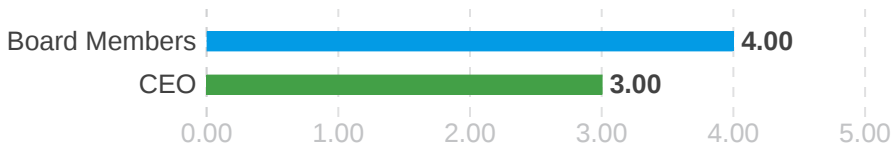
Click to write Statement 8



Recognized strength

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

Click to write Statement 9



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

Field	1 Responses					Total
	Unsatisfactory	Needs Improvement	Meets Expectations	Exceeds Expectations	Exceptional	
Click to write Statement 1	0.00%	0.00%	0.00%	100.00%	0.00%	
Click to write Statement 2	0.00%	0.00%	0.00%	100.00%	0.00%	
Click to write Statement 3	0.00%	0.00%	0.00%	100.00%	0.00%	
Click to write Statement 4	0.00%	0.00%	0.00%	100.00%	0.00%	
Click to write Statement 5	0.00%	0.00%	0.00%	100.00%	0.00%	

Click to write Statement 6	0.00%	0.00%	0.00%	100.00%	0.00%
Click to write Statement 7	0.00%	0.00%	0.00%	100.00%	0.00%
Click to write Statement 8	0.00%	0.00%	0.00%	100.00%	0.00%
Click to write Statement 9	0.00%	0.00%	0.00%	100.00%	0.00%
Click to write Statement 10	0.00%	0.00%	0.00%	100.00%	0.00%

1.0 Do you have specific comments about the chief executive's performance on these annual goals?

Board Members

Not sure

CEO

Yes

Section Two: Core Competencies for Nonprofit Chief Executives

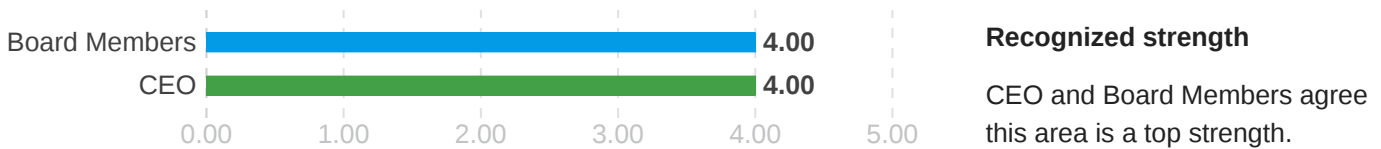
While there is no single model for effective nonprofit leaders, a number of core areas of responsibility are essential for success. These competencies -- planning, administration, board relations, financial management, communications and public relations, and fundraising -- will be covered in this section.

2.1 Planning

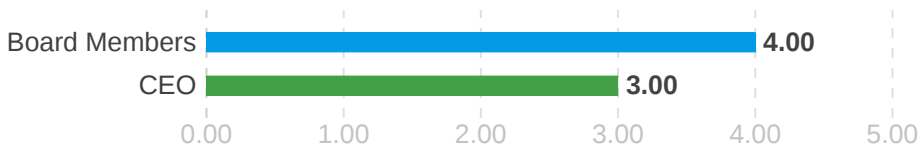
(Average Overall Score For This Section: 3.79)

Preparing for the future is one of the most critical leadership responsibilities of the chief executive. Working with the board, the chief executive must develop a shared vision for the future of the organization, build understanding around the mission, and develop appropriate goals and strategies to advance that mission.

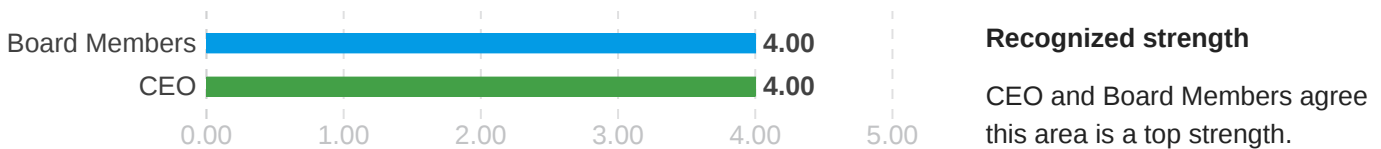
2.1a In collaboration with the board, articulated a clear vision for the future of the association



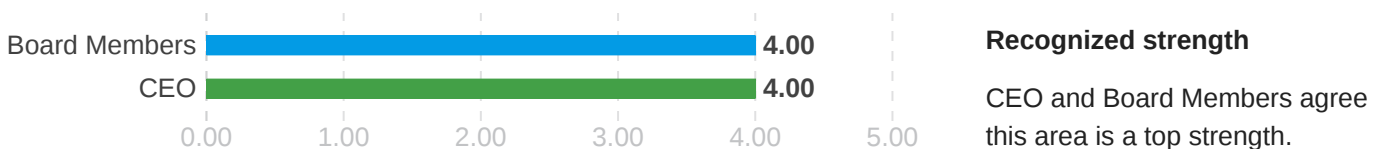
2.1b Used the mission of the association as a guide in making decisions



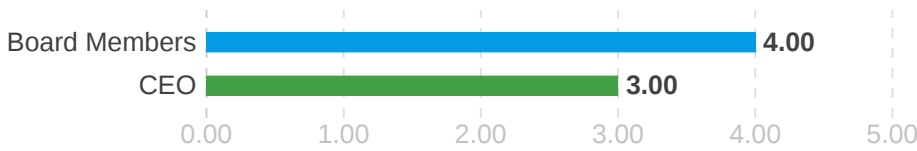
2.1c Engaged the board and staff in a meaningful process to set priorities and develop a written strategic plan



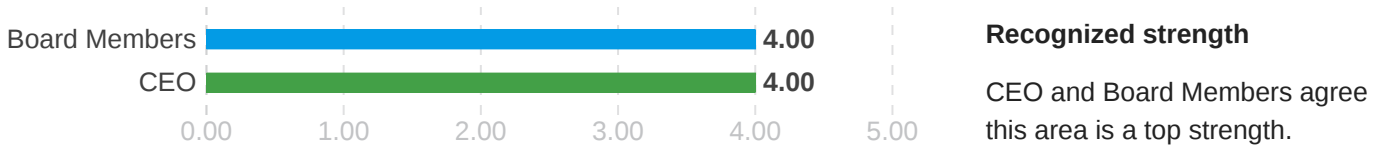
2.1d Effectively led the organization in assessing and responding to changes in the association's environment



2.1e Oversaw the development of appropriate goals and objectives to advance the mission



2.1f Effectively led the staff in implementing the strategic plan and annual goals



2.1g Engaged board members, collectively and individually, to think strategically and adapt to changing needs



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

Field	1 Responses					Total
	Unsatisfactory	Needs Improvement	Meets Expectations	Exceeds Expectations	Exceptional	
2.1a In collaboration with the board, articulated a clear vision for the future of the association	0.00%	0.00%	0.00%	100.00%	0.00%	
2.1b Used the mission of the association as a guide in making decisions	0.00%	0.00%	0.00%	100.00%	0.00%	
2.1c Engaged the board and staff in a meaningful process to set priorities and develop a written strategic plan	0.00%	0.00%	0.00%	100.00%	0.00%	
2.1d Effectively led the organization in assessing and responding to changes in the association's environment	0.00%	0.00%	0.00%	100.00%	0.00%	
2.1e Oversaw the development of appropriate goals and objectives to advance the mission	0.00%	0.00%	0.00%	100.00%	0.00%	
2.1f Effectively led the staff in implementing the strategic plan and annual goals	0.00%	0.00%	0.00%	100.00%	0.00%	
2.1g Engaged board members, collectively and individually, to think strategically and adapt to changing needs	0.00%	0.00%	0.00%	100.00%	0.00%	

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

Board Members

No additional comments

CEO

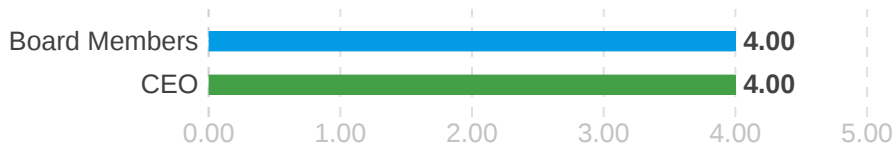
Not Applicable

2.3A Board Relations

(Average Overall Score For This Section: 3.58)

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.

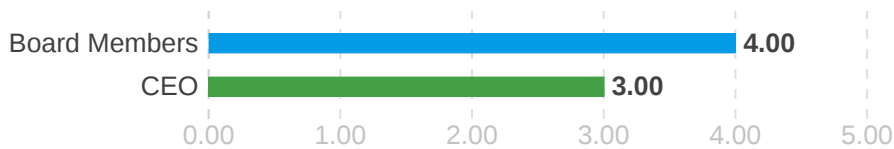
2.3a Maintained an effective working relationship with the board, characterized by open communication, respect, and trust



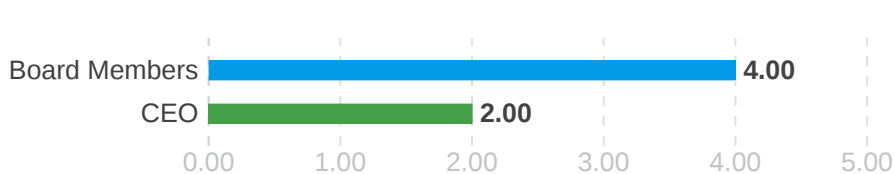
Recognized strength

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



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



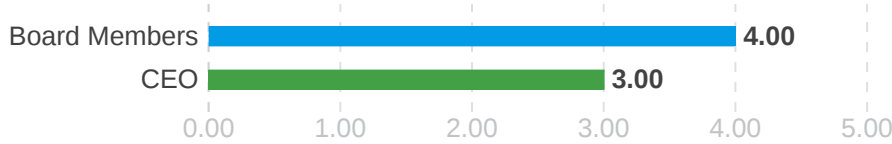
Unrecognized improvement area

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

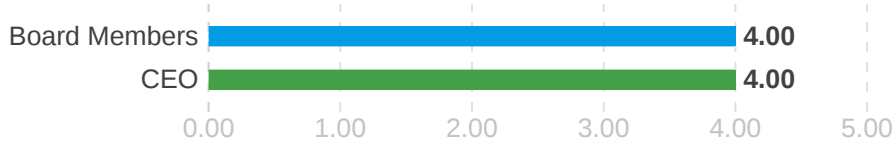
2.3d Served as an effective liaison between board members and staff



2.3e Supported board development, especially recruitment, in conjunction with board leadership



2.3f Worked to leverage the talent and expertise of individual board members



Recognized strength

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

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

Field	1 Responses					Total
	Unsatisfactory	Needs Improvement	Meets Expectations	Exceeds Expectations	Exceptional	
2.3a Maintained an effective working relationship with the board, characterized by open communication, respect, and trust	0.00%	0.00%	0.00%	100.00%	0.00%	
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%	0.00%	100.00%	0.00%	
2.3c Provided board members with the appropriate information needed to support informed decision making and effective governance	0.00%	0.00%	0.00%	100.00%	0.00%	
2.3d Served as an effective liaison between board members and staff	0.00%	0.00%	0.00%	100.00%	0.00%	
2.3e Supported board development, especially recruitment, in conjunction with board leadership	0.00%	0.00%	0.00%	100.00%	0.00%	
2.3f Worked to leverage the talent and expertise of individual board members	0.00%	0.00%	0.00%	100.00%	0.00%	

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

Board Members

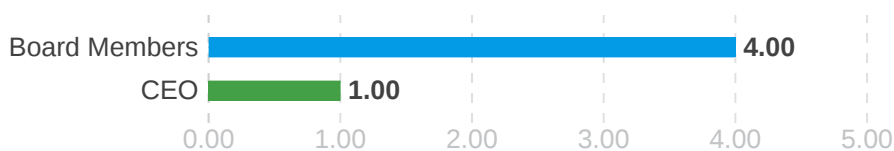
Not at this time

2.5 Communications and Advocacy

(Average Overall Score For This Section: 3.25)

The chief executive, whether in the role of primary spokesperson or otherwise, often serves as the "public face" for the association. This role has three major components: effectively promoting the association, advocating for the mission and work of the association, and building relationships with constituent or stakeholder groups critical to the success of the association. It includes *communications* activities related to positioning the association and *advocacy* efforts aimed at advancing the association's industry or profession.

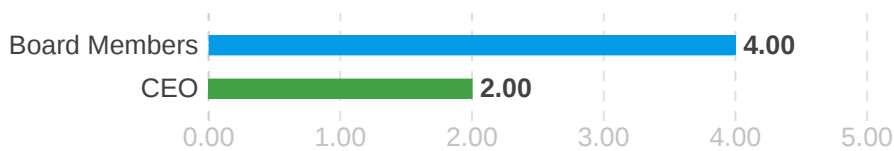
2.5a Served as an articulate and effective spokesperson for the industry or profession



Unrecognized improvement area

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

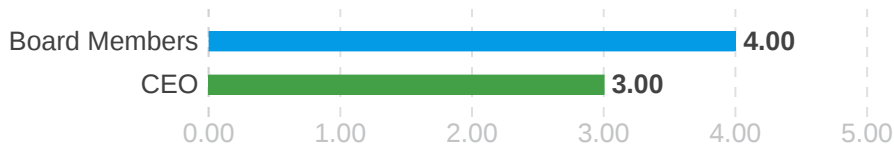
2.5b Maintained an open dialogue with the association's members



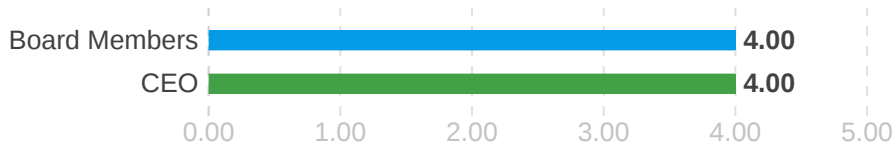
Unrecognized improvement area

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

2.5c Established and maintained positive relationships with individuals and groups that impact the success of the association, including thought leaders in the field, educators, policy makers, and donors



2.5d Exercised sound judgment and appropriately involved the board in advocacy and communication issues related to the industry or profession



Recognized strength

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

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
2.5a Served as an articulate and effective spokesperson for the industry or profession	0.00%	0.00%	0.00%	100.00%	0.00%	
2.5b Maintained an open dialogue with the association's members	0.00%	0.00%	0.00%	100.00%	0.00%	
2.5c Established and maintained positive relationships with individuals and groups that impact the success of the association, including thought leaders in the field, educators, policy makers, and donors	0.00%	0.00%	0.00%	100.00%	0.00%	
2.5d Exercised sound judgment and appropriately involved the board in advocacy and communication issues related to the industry or profession	0.00%	0.00%	0.00%	100.00%	0.00%	

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

Board Members

Not sure

Section Three: Personal Leadership Qualities

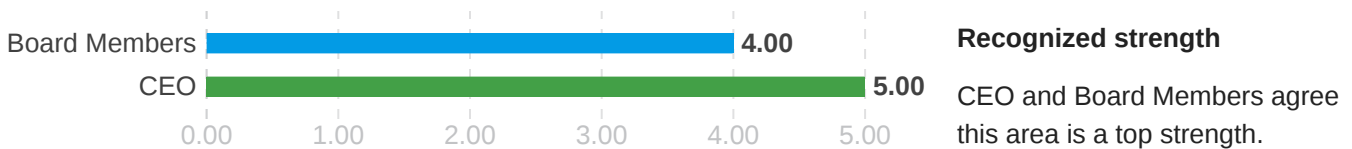
Beyond the core functional responsibilities of the chief executive, a number of additional skills are important to the chief executive's success.

3.1 Leadership Skills

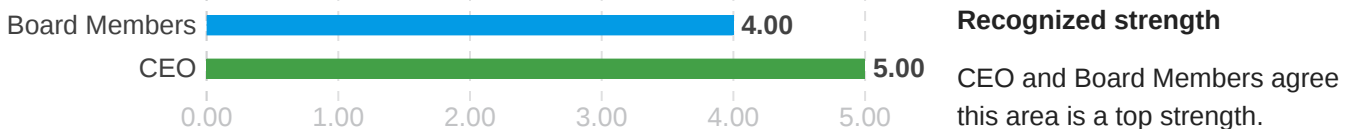
(Average Overall Score For This Section: 4.31)

Leadership skills are important to the chief executive's success and a core functional responsibility.

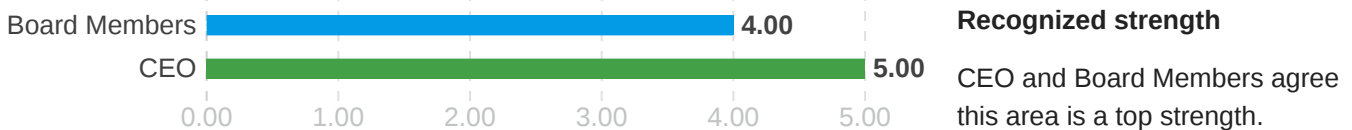
3.1a A clear commitment to the association's mission and values



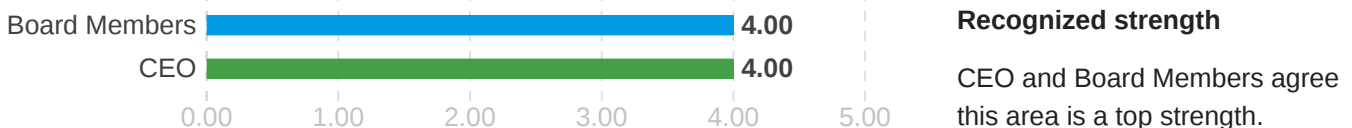
3.1b An ability to motivate and engage others in advancing the mission of the association



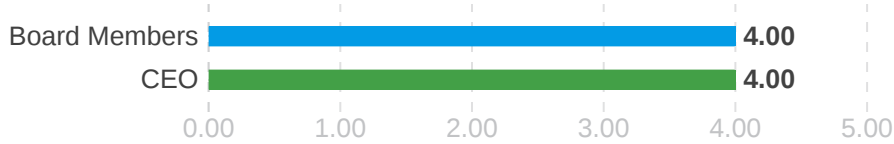
3.1c An ability to learn from the successes and failures of the past in planning for the future



3.1d A willingness to ask difficult questions and challenge organizational assumptions



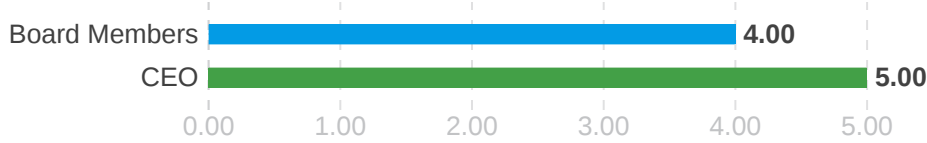
3.1e An awareness of trends and information in the external environment that may impact the association



Recognized strength

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

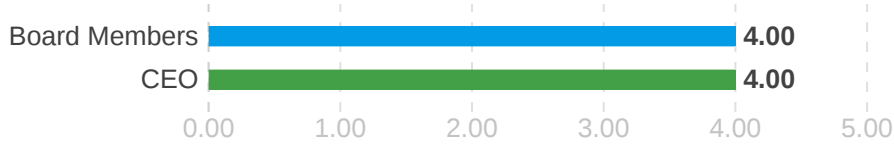
3.1f A broker of ideas with the ability to facilitate visionary thinking throughout the organization



Recognized strength

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

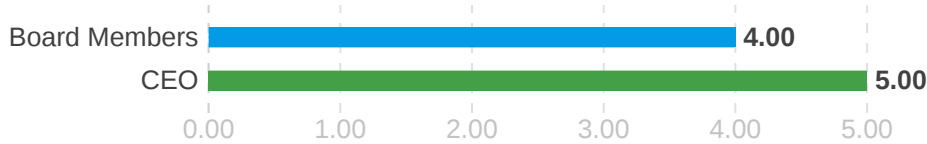
3.1g Courage and flexibility in leading during times of change



Recognized strength

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

3.1h A strong sense of moral and ethical integrity



Recognized strength

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

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	1 Responses	
					Exceptional	Total
3.1a A clear commitment to the association's mission and values	0.00%	0.00%	0.00%	100.00%	0.00%	
3.1b An ability to motivate and engage others in advancing the mission of the association	0.00%	0.00%	0.00%	100.00%	0.00%	
3.1c An ability to learn from the successes and failures of the past in planning for the future	0.00%	0.00%	0.00%	100.00%	0.00%	
3.1d A willingness to ask difficult questions and challenge organizational assumptions	0.00%	0.00%	0.00%	100.00%	0.00%	

3.1e An awareness of trends and information in the external environment that may impact the association	0.00%	0.00%	0.00%	100.00%	0.00%
3.1f A broker of ideas with the ability to facilitate visionary thinking throughout the organization	0.00%	0.00%	0.00%	100.00%	0.00%
3.1g Courage and flexibility in leading during times of change	0.00%	0.00%	0.00%	100.00%	0.00%
3.1h A strong sense of moral and ethical integrity	0.00%	0.00%	0.00%	100.00%	0.00%

3.1 Do you have any specific comments about the chief executive's leadership skills?

Board Members

Great work

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

Nothing comes to mind

CEO

Not Applicable

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

not sure

CEO

Great

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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