

# President & CEO Evaluation Process

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## I. Purpose

The evaluation of the President & CEO is a key governance responsibility. The process promotes accountability for results, fosters continuous improvement, and ensures alignment between the organization's mission, strategic priorities, and leadership performance. The process emphasizes collaboration, evidence-based reflection, and alignment with strategic goals rather than isolated events or subjective impressions.

## II. Structure

The Executive Committee conducts the formal evaluation of the President & CEO on behalf of the full Board and completes individual ratings of the CEO across the established performance domains. Ratings are based on both quantitative and qualitative evidence gathered throughout the year, including the CEO's self-evaluation, organizational reports, outcomes data, and community feedback.

The average of the remaining individual ratings determines the composite score for each domain. An overall rating is awarded based on the average of the domain ratings. The results of the evaluation will inform performance-based increases awarded to the President & CEO, as well as continuous improvement of the President & CEO.

## III. Domains and Performance Indicators

Performance is assessed using the domains and indicators below. Evaluators consider these indicators when determining the rating for each domain.

If a score of 1 (Unsatisfactory) or 2 (Acceptable) is assigned, the evaluator must provide a rationale referencing one or more performance indicators and include a recommendation for improvement.

Comments, including commendations, may be entered for any score level. All comments will appear in a Notes section at the end of each domain.

### 1. Mission, Vision, and Strategy

1.a Facilitates collaborative, responsive strategic planning that engages board, staff, and community stakeholders, including the school district

1.b Advances the mission in alignment with strategic priorities and community/district needs

1.c Provides clear vision and leadership for organizational direction

1.d Effectively communicates mission and vision to staff, board, donors, and community partners

1.e Implements and refines strategies aligned with mission and goals set forth in strategic planning

## **2. Program Impact**

2.a Aligns programs with strategic planning goals for students and educators

2.b Promotes consistent delivery of high-quality, impactful programs by effectively coordinating people and resources

2.c Assesses program outcomes through practical measures (including qualitative feedback and available data), applies lessons learned to strengthen impact, and shares insights to deepen donor and community engagement

2.d Encourages thoughtful innovation and continuous improvement in program design while maintaining mission focus and strategic priorities

## **3. Community Engagement**

3.a Builds strong, collaborative relationships with community, business, and education partners

3.b Engages donors and volunteers as partners, aligning their passions and interests with the organization's mission

3.c Promotes authentic storytelling and volunteer, donor, and partner recognition that celebrates contributions and deepens commitment

3.d Serves as a visible, respected ambassador for the organization

## **4. Fundraising and Resource Development**

4.a Cultivates and stewards donors through authentic, donor-centered relationships that emphasize meaningful recognition and celebration of impact

4.b Builds a balanced donor pipeline across entry-level, mid-level, major, and planned giving, with strategies for qualification, cultivation, and retention

4.c Implements and sustains a consistent, systematic fundraising approach that provides structure for donor qualification, cultivation, solicitation, and stewardship

4.d Generates sustainable revenue, aligning donor partnerships with organizational priorities

## **5. Organizational Leadership and Management**

5.a Recruits, develops, and retains high-quality staff

5.b Aligns staff roles, processes, and priorities to promote team efficiency and effectiveness

5.c Fosters a positive, mission-driven culture of collaboration, engagement, and philanthropy in which staff and the board value donors and volunteers as partners in student and educator success

5.d Supports staff with tools, learning opportunities, and accountability systems that enable continuous improvement and success

5.e Maintains organizational operations through appropriate staffing, outsourcing, and structures that support efficiency, compliance, and mission effectiveness

## **6. Board Relations and Governance**

6.a Works in partnership with the Board, respecting governance/management boundaries

6.b Engages the Board in strategic planning and their governance role in resource development (e.g., advocacy, opening doors, stewarding donors)

6.c Provides the Board with timely, accurate, and strategic information to support effective governance

6.d Promotes board development and succession planning to strengthen long-term governance capacity

6.e Supports board focus on strategic priorities and governance functions, avoiding operational detail

## **7. Fiscal Management**

7.a Collaborates with the Board and staff to set budget priorities in alignment with organizational goals

7.b Provides accurate, transparent, and timely financial reporting to support decision-making

7.c Implements effective internal controls and complies with legal, audit, and regulatory requirements

7.d Aligns financial planning, decisions, and investments with strategic priorities

7.e Maintains adequate reserves and safeguards to support long-term organizational health

#### **IV. Rating Scale**

<u>Rating</u>	<u>Points</u>	<u>Description</u>
Highly Effective	4	Consistently exceeds performance expectations
Effective	3	Performs duties effectively
Acceptable	2	Demonstrates an acceptable level of performance
Unsatisfactory	1	Does not meet performance expectations

#### **V. Timeline**

##### **Mid-Year Conference (January):**

The CEO provides brief self-reflections for each domain in advance of the mid-year conference. During the conference, each Executive Committee member provides a tentative verbal rating for each domain and offers concise verbal feedback. The CEO has the opportunity to share reflections regarding the feedback from each Executive Committee member at the conclusion of that member's comments.

##### **CEO Self-Evaluation (Due May 15):**

The CEO submits a written self-evaluation summarizing progress in each domain and providing evidence of outcomes, alignment with strategic priorities, and reflections on challenges and next steps.

### **Executive Committee Review:**

Each member reviews the self-evaluation and relevant organizational data, then independently completes the evaluation form with domain ratings and comments and submits the completed form to the Board Chair in accordance with the timeline articulated by the Chair.

### **Synthesis:**

The Board Chair or Governance Committee Chair compiles and averages the domain ratings

and prepares a summary of findings and comments. The Board Chair creates a draft evaluation form reflecting ratings.

### **Evaluation Conference with CEO:**

The Executive Committee and CEO meet to discuss the draft evaluation document. The CEO has the opportunity to provide reflections relating to the draft document during the conference before the Executive Committee finalizes it and provides the finalized evaluation to the CEO by the end of June.

## **VI. Performance Evidence**

Evaluation evidence may include, but is not limited to:

- The CEO's annual self-evaluation narrative and supporting documentation
- Strategic plan progress reports and key performance metrics
- Development, program, and financial reports
- Stakeholder feedback (staff surveys, donor or partner input)
- Examples of community engagement and advocacy
- Board committee reports or meeting minutes reflecting leadership and outcomes

As part of gathering performance evidence, members of multiple stakeholder groups will be invited to provide brief, structured feedback on the CEO's leadership and the organization's effectiveness. Surveys may include three to seven questions and are intended to inform, not determine, Executive Committee ratings. All non-Executive Committee board members will be surveyed. Other respondents may include staff members of Champions For Learning, CCPS staff, and nonprofit partners that collaborate with Champions For Learning. When available, data from surveys with volunteers and donors regarding their experience with the organization will also be considered. All feedback will be summarized by group to preserve confidentiality.

Executive Committee members will consider this evidence in rating each domain.