# Managing a Successful CEO Evaluation Using BoardOnTrack



## Introduction

CEO Evaluation process defined in BoardOnTrack outlines our lessons learned working with hundreds of charter school boards across the country. Process is a key to an effective evaluation and we have tried to take the guesswork out of this for you and outlined what to do and when to do it.

**To learn more about best practices for evaluating the CEO check out our resources here.**

**Review the questions that are asked during the surveys prior to opening here.**

## Anonymity and security

We understand that annual CEO Evaluation is a sensitive topic. We make every effort to retain as much anonymity as possible and to ensure that the information is accessible to only those that should have access to it.

- Only board members can have access to any of the reports.
- Anonymity is retained by only allowing reports to be shared if there is a minimum of 2 responses. For the board's surveys this will not be a problem, however for senior staff you need 2 fully completed surveys to have their results included.
- The CEO's survey responses can be viewed by the board.

Below is an example of where only one staff member/direct report completed their survey, but the report was published. As there was only one response the staff results are not shown at all to the board. The same occurs if there are not sufficient board member responses.

## Prerequisites for running a CEO Evaluation

There are a couple of quick items that you need to make sure you are all set to make the process run as smoothly as possible.

**Need a CEO assigned**

You definitely need a CEO set up in BoardOnTrack. Your BoardOnTrack admin can add the CEO if they have not been added yet. This resource will help them. In BoardOnTrack you can also see who is set up on your team here.

**Need a CEO Evaluation and Support Committee with assigned chair**

As part of a successful process you must have an active CEO Evaluation and Support Committee and a committee chair identified. You may use a different name for your committee as long as the committee **Type** is set to "**CEO Support And Eval**". BoardOnTrack adds a committee of this type automatically, but if you have renamed it or deleted it ask your BoardOnTrack admin to add a committee or check the existing type. This resource provides information on managing the committees and committee members. You can see what committees and members you have assigned here.

**Ensure you have a person assigned to manage the process (CEO Evaluation Coordinator)**

It is best practice for the board to assign a member of the CEO Evaluation and Support committee to manage the overall process and ensure that everybody is fully invested in the evaluation's success. This resource shows a BoardOnTrack admin how to assign the correct permissions.

**Need all board members active in BoardOnTrack**

All board members should already be set up in BoardOnTrack. If they are not, ask your BoardOnTrack admin to add them as soon as possible and ensure that they set up their account. You can see who is on your team and when they last logged in here.

**Need all direct reports/senior staff active in BoardOnTrack**

If you plan for senior staff/direct reports to evaluate the CEO they also need to be set up in BoardOnTrack. If they are not, ask your BoardOnTrack admin to add them as soon as possible and ensure that they set up their accounts as well.

You need to make sure that the CEO, board members and staff that are planning to take part in the CEO Evaluation have already successfully logged in to BoardOnTrack.

## Adding a new CEO Evaluation

Let's get started on the CEO Evaluation process. The **CEC (CEO Evaluation Coordinator)** should launch a new CEO Evaluation.

Go to "**CEO Evaluations**" and then click on "**Add**".

We will then show you the CEO you have set up in BoardOnTrack. Check that is your current CEO. If it is not select "Cancel" and update your team appropriately. If you have a Co-Executive Director/CEO scenario you can set up an evaluation for each one separately.

Provide a "Title" for the evaluation. This should be something descriptive that your team will understand.

Then select the date that you plan to kick-off the CEO Evaluation process.

Once you select a start date we will lay out a recommended timeline for you. If you need to adjust the timeline you can do so after you add the run initially. We show you how to do this here.

## Reviewing and updating your CEO Evaluation timeline

Now take a look at the timeline and fine-tune if necessary. When you provided a start date, BoardOnTrack automatically created a timeline for you over a 90 day timeframe with key actions and suggested due dates.

Below is an example timeline.

Let's say however that you wish to have the whole process wrapped up earlier. Click on the  to take you back to the list of all the CEO Evaluations, then click on the .

You can then update the date that you would like the whole process to be completed by, or even change the starting date.

You can adjust the timeline when the evaluation is in progress, however if you have made changes to individual due dates of the process actions they we'll be over-written if you change the start/end dates.

Once you have updated the start/finish dates you will see the timeline has been recalculated for you with new due dates for the process actions. If you wish to change a specific due date for one of the actions you can do so by clicking on the .

If you update an individual date it only affects that specific action step and none of the following or previous dates.

Everyone who has access to the CEO Evaluation area will be able to see the process timeline.

## Checking the participants are correct

When the CEO Evaluation is set up BoardOnTrack will have the CEO included as a participant and automatically add your existing board members.

If you need to remove a board member then click on the

To add board members who are missing or if you are planning to include senior staff/direct reports click on

You should now have a complete roster of the participants in the CEO Evaluation.

## Process actions in detail

You are now ready to get rolling with carrying out the CEO Evaluation.

As you go through the process BoardOnTrack shows you a status icon, the date the action is due, and when the action was actually achieved:

The action has been completed successfully.

The action needs your attention.

The action is overdue.

Nothing needs to be done with this action item yet.

**Ensure committee is formed**

To have the first step checked off successfully you need to have a committee of the **Type** "**CEO Support And Eval**" and committee chair assigned.

Once the committee is set up your first action step will be marked as complete and show you that the next one is ready for you. If you already had a committee and chair set up the first one will already be marked as achieved.

**Open the CEO self evaluation**

OK, let's get the CEO's Self Evaluation to the CEO. Click on Add a personal note to include in the email that will be sent to the CEO asking them to complete their survey.

The CEO will then receive an email requesting them to complete survey and the action will be marked as complete.

BoardOnTrack recommends that the self evaluation be completed and shared with the board prior to the board being requested to complete their surveys.

When someone is asked to complete a survey, in addition to the email being sent, BoardOnTrack shows that CEO Eval survey needs completion on the dashboard and that an action is needed on a specific CEO evaluation.

**Complete the CEO self evaluation**

This step will now be marked as requiring attention. Once the CEO completes their self-evaluation the action will be marked as achieved and the date it was completed will be updated.

If you need to send a reminder click on the "Send Reminders". This will send an email to anybody who has not yet completed a survey.

**Share the CEO self evaluation**

Once the CEO has completed their self evaluation the CEC will be informed by email. You will then be able to share it with the board.

Click on the "Share" button. BoardOnTrack recommends that you share the self evaluation with all the board members. Add a custom note if you wish.

The board members will receive an email telling them the self evaluation report is ready for them to review.

**Open the board's CEO evaluation**

Once you have shared the CEO's self evaluation with the board you can request the board to complete their surveys. BoardOnTrack recommends that you share the CEO's self-evaluation with the board prior to requesting them to complete their surveys.

When opening the board member survey the list of board members from the participants list are automatically included. Add a personal note if you wish as well. Once you click "Open" the board members will receive an email requesting them to complete their surveys.

If you had already shared a final report it will be un-shared with the board if you are now asking additional board members to take the survey.

**Complete the board's CEO evaluation**

Once all your board members take their surveys this action will be marked as achieved automatically. If there is not 100% completion of the surveys by the board this action will continue to show as requiring action and subsequently "Overdue" once the due date has passed.

You can manually close the surveys so that participants cannot take the survey. Just click on "Close" and then confirm that you wish to close the surveys.

**Open the direct reports' CEO evaluation**

You can request the direct reports to complete their surveys at anytime as they do not have an opportunity to see the CEO's Self Eval, however this action is placed at the same time as opening the survey for the board members for simplicity in managing the process.

When opening the direct report's survey the list of direct reports from the participants list are automatically included. Add a personal note if you wish as well. Once you click "Open" the direct reports will receive an email requesting them to complete their surveys.

If you had already shared a final report it will be un-shared with the board if you are now asking additional direct reports to take the survey.

**Share the CEO evaluation report**

Once everyone has completed their surveys you should then share the summary report with the CEO Support and Evaluation Committee.

When the report is shared BoardOnTrack automatically closes any of the survey's that were open, so that no additional people can take them. Only board members have access to the report.

The board/committee members will receive an email letting them know that the CEO evaluation report is available for their review.

**Create memo for leader**

Once the CEO Support and Evaluation Committee, approved by the board (speaking as one voice), have created a summary memo for the CEO, it should be attached to the CEO evaluation report.

Only a board member can attach a memo to the report as the CEC (CEO Evaluation Coordinator) does not have access to the report area. Once uploaded only the person who uploaded it can delete it.

Once it is attached to the report the action step will be marked as complete.

**Define the development plan with the CEO and Define key results**

Once the development and the key results for the period prior to the next annual evaluation have been defined just simply check this as "complete".

Congratulations you have completed a CEO Evaluation and set the CEO up for success in the coming year.

**Define key results**

## Sending reminders

If you need to send a reminder click on the "Send Reminders". This will send an email to anybody who has not yet completed a survey that they have been requested to complete.

## Re-opening a survey

If you have shared the CEO's evaluation report with the board and realize that either a board member or direct report/staff has not completed their survey and now want their responses included, the survey can be re-opened.

When a survey is re-opened the CEO's evaluation report is un-shared with the board members. After the additional participants have completed their survey share the report again.

## Viewing the CEO Evaluation report

Once the participants have completed all their surveys and the CEO evaluation report has been shared the report can be viewed by the board members.

The main report page shows the summary level ratings for the core and job specific competencies. If the memo to the CEO has been attached to the report, or any supporting documents they will be shown as well. The participants who took part are also shown.

If any of the responses are hidden to protect anonymity you may need to re-open a survey, and then re-share the CEO evaluation report.

For the 3 additional questions/comments:

- What are your most significant accomplishments and/or strengths demonstrated this year?
- What are the top three things you should do next year to move the organization forward?
- List any key challenges in the year ahead, for yourself and/or for the organization.

The responses are shown at the bottom of the summary review rating.

To view the details click on "View Details" and see the breakdown of the individual competencies that are measured. Any additional comments or supporting examples are included at the bottom of the detail report.

## Printing the CEO Evaluation Report

To view the CEO Evaluation report in a single PDF or to print it out click on the print iconYou can then view the CEO Evaluation report in a single view and then select to print it if you wish. Use your own systems print/Save As function to save as a PDF.

## Adding additional documents to support the CEO Evaluation

If you have additional documents that are supporting the CEO Evaluation such as the results from teacher or parent satisfaction surveys you can add them to the report page.

Only a board member can attach documents to the report as the CEC (CEO Evaluation Coordinator) does not have access to the report area. Once uploaded only the person who uploaded it can delete it.