FIRST-YEAR REVIEW · 2025

Leadership and organizational health

How the President, the Board and staff saw the organization in the first review year. This is the baseline for the years that follow.

Board and President edition

WHO RESPONDED, 2025

Board, rating the President	7 of 7
Board self-review	*withheld*
Staff	20 of 24
President	self

The review year ran from 1 November 2024 to 31 October 2025. Group results appear only with 5 or more responses.[14]

CONTENTS

Report card p. 2
Every area on one page, with questions for discussion

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Eight responsibilities, goals, and alignment with staff and the Board

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Notes and sources p. 10
Method, exceptions and the source of every figure

Sample report. The organization and all data are fictional. A real report is confidential to the Board and the President.

Start with the report card, p. 2

AT A GLANCE, 2025

7/7 Board replied
83% Staff replied
3 goals approved
3 staff actions set

REPORT CARD · YEAR ONE

the baseline, on one page

A solid start. Staff are least sure how decisions are made, and the Board's own view is missing.

● Board ◆ President ■ Staff | ● filled: the score ○ outline: the other view

AREA	2025 RATING	SCORE	OTHER VIEW	STATUS[1]
PRESIDENT · EIGHT RESPONSIBILITIES[2]	3 Meets – 4 Exceeds		Board average; other view = self · p. 3	
Board partnership		3.8	3.5	
Ethics, risk and compliance		3.8	3.5	
Mission and strategic execution		3.8	3.7	
Financial stewardship		3.4	3.7	
Communication and trust		3.4	3.7	
Program quality and constituent experience		3.4	3.7	
Revenue and external relationships		3.4	3.7	
Leadership and staff development		**3.4**	3.6	FOCUS
BOARD PARTNERSHIP · SIX AREAS[3]	3 Meets – 4 Exceeds		President's view; other = Board · p. 5	
Chair communication		**3.7**	*withheld*	STRENGTH
Direction and expectations		3.5	*withheld*	
Timely decisions		3.5	*withheld*	
Authority to manage		3.5	*withheld*	
Support and resources		3.5	*withheld*	
Candor and working relationship		3.5	*withheld*	
ORGANIZATIONAL HEALTH · NINE DOMAINS[4]	3 Neutral – 4 Agree		Staff average · p. 6	
Mission and priorities		**4.2**		STRENGTH
Quality and responsiveness		3.8		
Workload and resources		3.5		
Roles and expectations		3.3		
Leadership and supervisor support		3.2		
Communication		3.1		
Trust, respect and speaking up		3.0		
Collaboration and conflict		3.0		
Decisions and accountability		**2.6**		FOCUS
LEADERSHIP ALIGNMENT · WIDEST GAPS[5]	3 Neutral – 4 Agree		Staff average; other view = Board · p. 4	
Follows through on commitments · gap 1.3		2.8	4.0	
Uses feedback to improve · gap 1.0		3.0	4.0	

FOR DISCUSSION Three questions for the next Board meeting, from the rows marked Focus and the widest gap

1. Decisions and accountability is the only staff domain below neutral, at 2.6. What would staff need to see in the next year to rate it higher? p. 6
2. Staff rate the President's follow-through on commitments 1.3 below the Board. What does each group see that the other does not? p. 4
3. Too few Board members completed the Board self-review to report it. How will the Board make sure its own view can be seen next year? p. 5

This is the baseline year. Change and direction begin with the second review.[13] · How to read, p. 9 · Notes 1–5 → p. 10

WHO RATED

All 7 Board members, and the President rating their own work.[6]

Three goals were approved in December 2024 for the three review years.[7]

PRESIDENT · FIRST-YEAR REVIEW

eight responsibilities, one year

The Board rates three responsibilities near Exceeds. Five sit just above Meets.

FIGURE 1

Mission, Board partnership and ethics lead. On the five lower areas the President rates their own work about 0.3 higher than the Board does.

● Board average 7 members ◇ President, self one person

RESPONSIBILITY	3 Meets – 4 Exceeds	BOARD	SELF	SELF – BOARD
Board partnership		**3.8**	**3.5**	**−0.3**
Ethics, risk and compliance		**3.8**	**3.5**	**−0.3**
Mission and strategic execution		**3.8**	**3.7**	**−0.2**
Financial stewardship		3.4	3.7	+0.3
Communication and trust		3.4	3.7	+0.3
Program quality and constituent experience		3.4	3.7	+0.3
Revenue and external relationships		3.4	3.7	+0.3
Leadership and staff development		3.4	3.6	+0.2

Averages on the 1–5 expectations scale, shown from 2.5 to 4.5; the darker tick is 3, Meets · How to read, p. 9 · Notes 6 → p. 10

FIGURE 2

All three goals are under way, and every milestone due this year was met early.

GOAL AND OWNER	BASELINE	OCT 2025	TARGET	MILESTONES DUE THIS YEAR
Improve timely decision communication President	55%	**60%**	85%	Agree shared decision log, done 15 Jun
Reduce service request turnaround Operations lead	12 days	**10 days**	8 days	Define request categories, done 20 Jun
Clarify governance and management decision rights Board Chair and President	–	–	–	Draft decision rights, done 15 Sep

Values on 31 October 2025 · Note 7 → p. 10

THE LENS

Six statements asked of the Board, staff and the President in identical words, on the same agreement scale.

Gap = Board average minus staff average.[5] It shows where experience differs, not who is right.

PRESIDENT · LEADERSHIP ALIGNMENT LENS

the same six statements, three perspectives

Board and staff agree on how decisions are explained. They differ on four of six statements about what follows.

FIGURE 3

The Board agrees with all six statements. Staff sit near neutral on four.

● Board 5–7 each statement ■ Staff 18–20 ◆ President, self one person

STATEMENT, ASKED OF ALL THREE GROUPS	3 Neutral · 4 Agree	BOARD	STAFF	GAP
The President follows through on commitments they communicate.		**4.0**	**2.8**	**1.3**
The President uses feedback to improve how the organization operates.		**4.0**	**3.0**	**1.0**
The President responds respectfully when concerns are raised.		4.0	3.1	0.9
The President demonstrates an understanding of the practical challenges in the organization's work.		4.0	3.2	0.8
The President explains the organization's current priorities clearly.		4.0	4.0	none
The President explains the reasons for significant decisions.		4.0	4.0	none

Averages on the 1–5 agreement scale, shown from 2.5 to 4.5; the darker tick is 3, Neutral · How to read, p. 9 · Notes 5, 8 → p. 10

THREE OBSERVATIONS

01

Staff are least sure the President follows through on commitments: 2.8, against the Board's 4.0.

The widest gap in the lens. It matches the lowest staff domain, Decisions and accountability. → p. 6

02

Both groups agree the President explains priorities and the reasons for decisions.

No gap on either statement. The difference is in what happens after a decision, not in how it is explained.

03

On two statements the President rates their own work at or below the staff view.

Responding to concerns and using feedback: President 3.0, staff 3.1 and 3.0, Board 4.0.[8]

WHO RATED

The President rated the Board's support. This is one person's view, shared with the Board by agreement.[9]

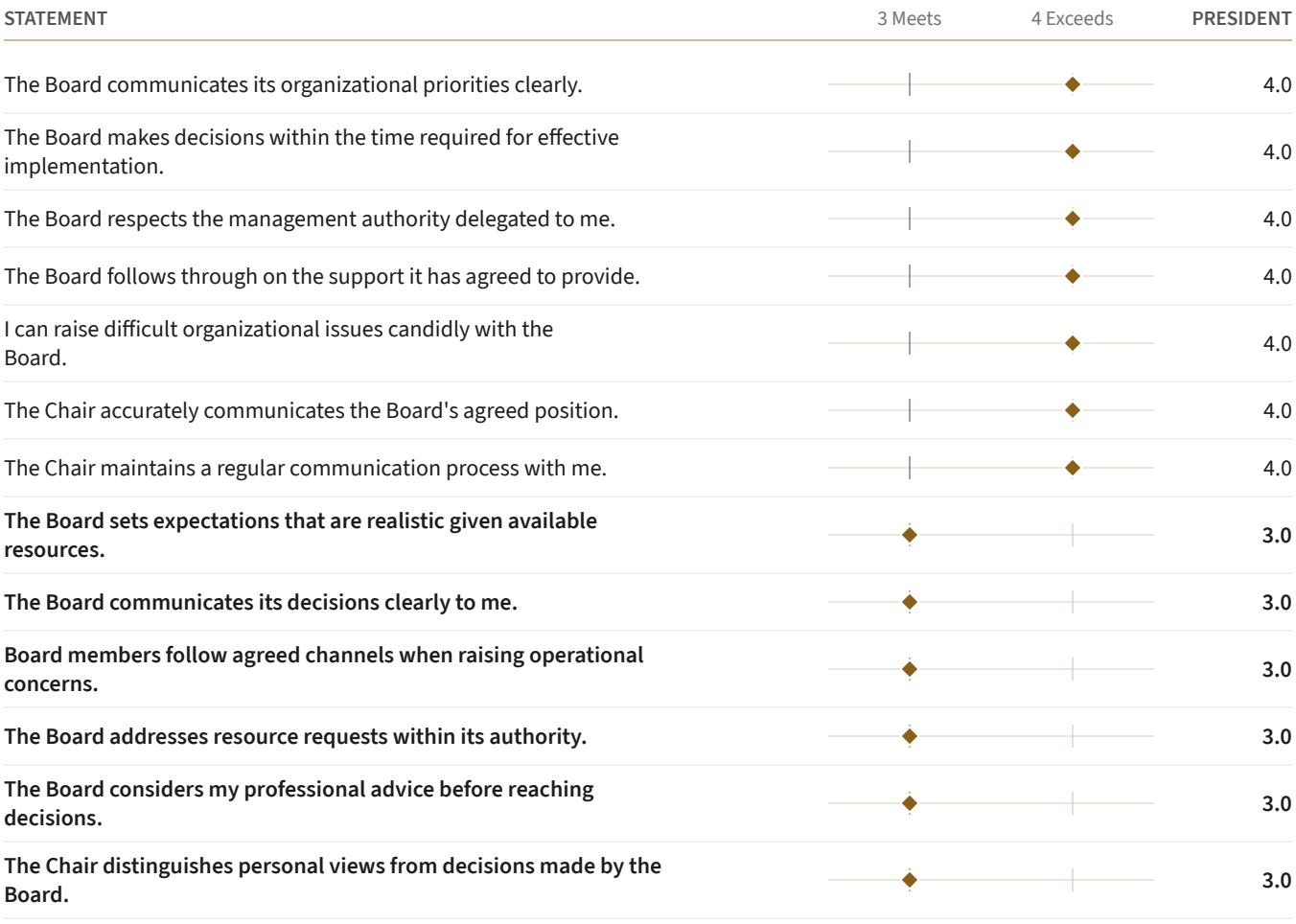
BOARD PARTNERSHIP · FIRST-YEAR REVIEW

thirteen statements, one perspective

The President rates the Board at Meets or above on every statement. The Board's own view is missing.

FIGURE 4

The President rates the Board highest on direction and on Chair communication; decisions, follow-through and resources sit at Meets.



Ratings on the 1–5 expectations scale, shown from 2.5 to 4.5; the darker tick is 3, Meets · exact wording as asked · How to read, p. 9 · Notes 9, 10 → p. 10

BOARD SELF-REVIEW

Withheld this year.[10]

Fewer than 5 of the 7 Board members responded, so no count, rate or score is shown, and the Board's view cannot be set beside the President's. The next report can compare them only if 5 or more respond.

STAFF PARTICIPATION

83%

20 of 24 staff responded.

A tenth domain, Learning and improvement, is added from 2026.

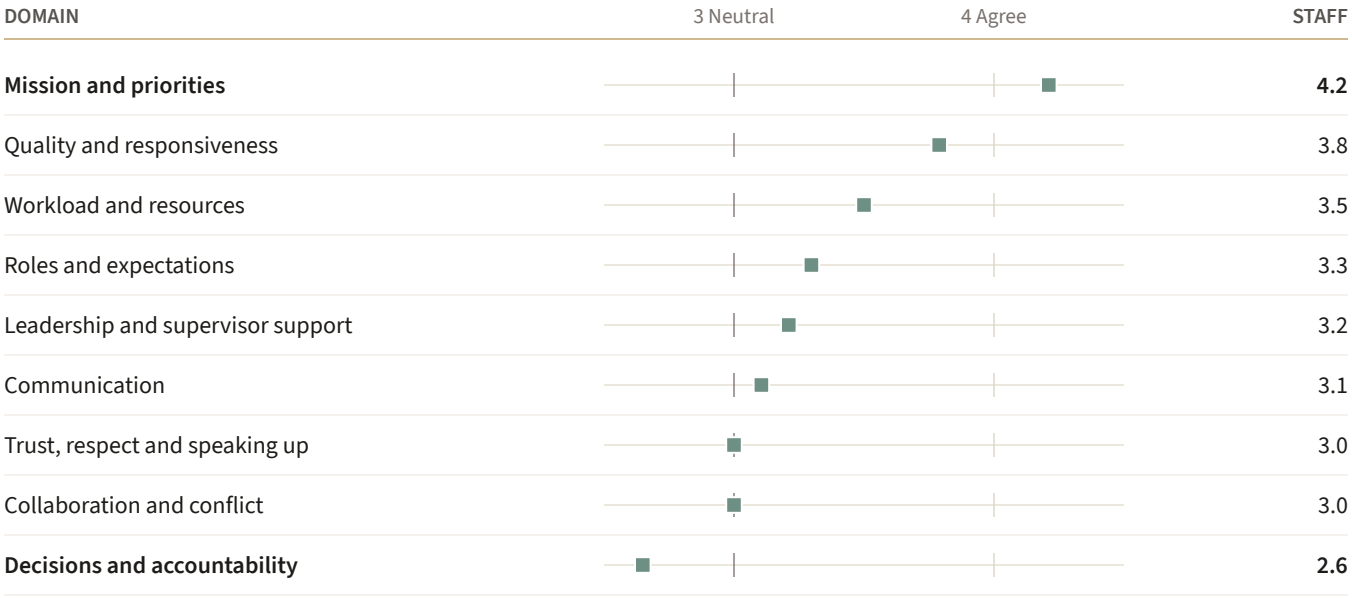
ORGANIZATIONAL HEALTH · FIRST-YEAR REVIEW

nine domains, one year

Staff are clear on mission. They are least sure how decisions get made and kept.

FIGURE 5

Nine domains, from highest to lowest.



Staff average on the 1–5 agreement scale, shown from 2.5 to 4.5; the darker tick is 3, Neutral · How to read, p. 9 · Notes 4 → p. 10

THREE FINDINGS

01

Staff are clearest on mission and priorities (4.2) and on quality and responsiveness (3.8).

Both sit at or above Agree. They are the foundation the other domains build from.

02

Decisions and accountability is the only domain below neutral, at 2.6.

Staff are unsure who is responsible and whether commitments are followed through. → p. 7

03

Trust and speaking up averages exactly 3.0, but that average hides two camps.

Staff split between agreeing and disagreeing, with few in the middle.[11] → p. 7

WHY THIS PAGE

Averages can hide how answers are spread. These are the two domains where the spread matters most.

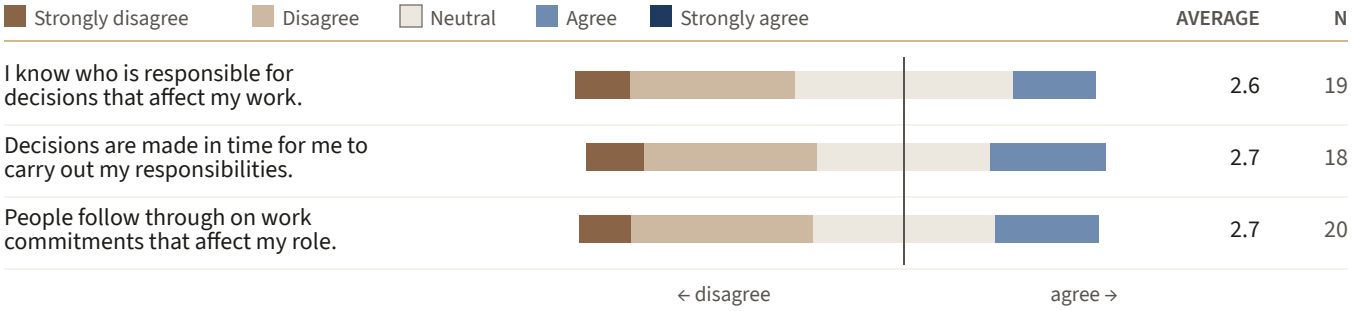
ORGANIZATIONAL HEALTH · BENEATH THE AVERAGES

what the averages hide

Decision items lean toward disagreement. On speaking up, staff split into two camps.

FIGURE 6

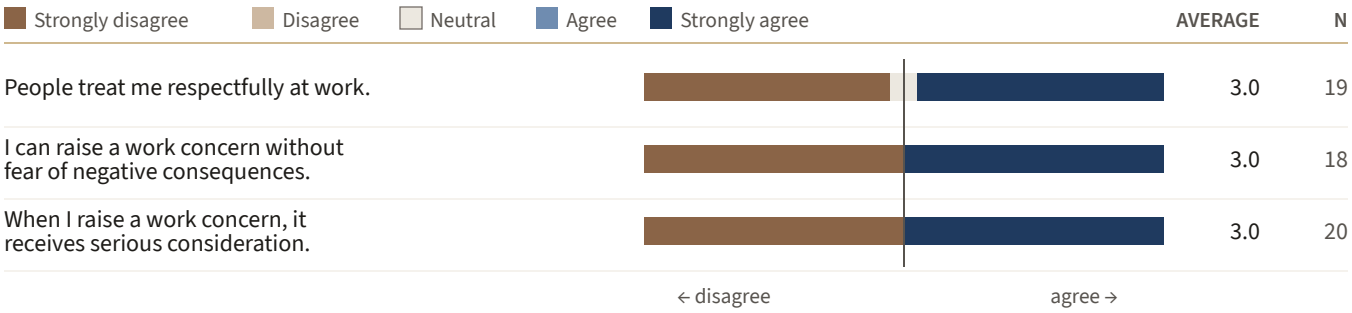
Decisions and accountability: more staff disagree than agree on each item.



Percent of valid responses, centred on neutral · How to read, p. 9 · Notes 11 → p. 10

FIGURE 7

Trust, respect and speaking up: an average near 3.0 hides strong views on both sides.



Percent of valid responses, centred on neutral · Note 11 → p. 10

FIRST ACTIONS

Three staff actions were agreed during the year. Two were completed before the survey closed, so their effect cannot show yet.[12]

ORGANIZATIONAL HEALTH · ACTIONS AND YEAR TWO

what was done, and what is next

Two first actions are done. Year two will show whether they made a difference.

FIGURE 8

Two of three actions were completed in October 2025; the cross-team pilot is proposed.

ACTION AND OWNER	STATUS, 31 OCT 2025
Establish a shared decision and commitment log President	● Completed, 15 Oct 2025
Complete a workload and resource process review Operations lead	● Completed, 15 Oct 2025
Pilot a cross-team handoff process President	○ Proposed

Status on 31 October 2025 · Note 12 → p. 10

PROPOSED FOR YEAR TWO

Not yet agreed. Owners and dates are set when the Board and President accept them.

1. **Decisions and accountability**
   Keep the new decision log in use and report on it at mid-year, so staff can see commitments being kept.
2. **Follow-through gap**
   The Board and President agree how follow-through on commitments will be shown to staff.
3. **Board self-review**
   Set a completion date and a reminder so 5 or more Board members respond next year.

WHAT NEXT YEAR'S REPORT ADDS

Change since this year	every rating gets a second value and a change.
Direction	by the third year, a path: rising, falling or steady.
Board beside President	if 5 or more Board members respond to the self-review.
Actions against outcomes	whether ratings moved after each action was completed.

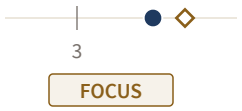
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HOW TO READ THIS REPORT

a guide to the pages before it

Every element, in the order it appears.

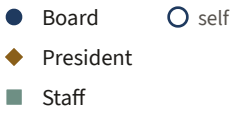
All ratings use 1–5. Responsibilities and Board partnership: 3 = Meets. Staff and alignment: 3 = Neutral.[2]



REPORT CARD AND STATUS p. 2

Each row is one area. The filled mark is the score; the outline is the other group's view of the same thing. The darker tick is 3.

FOCUS: lowest in its section. STRENGTH: highest in its section. Relative to this report only, not grades.



DOT CHARTS pp. 3–6

Every chart uses the same 2.5 to 4.5 window of the 1–5 scale, so distances compare directly. The same marker always means the same group.



ANSWER BARS p. 7

Each bar is one statement, split at neutral: disagreement to the left, agreement to the right. Use them to see a split that an average hides.



ACTIONS AND GOALS pp. 3, 8

Filled = completed, open = proposed. Goals show their baseline, the value on 31 October and the approved target.

withheld

PRIVACY all pages

Group results appear only with 5 or more responses. A withheld result shows no count, rate or score.

2025

THE FIRST YEAR all pages

This report is the baseline. Each later review adds a value, so change appears in year two and direction by year three.

Gap.[5]

NOTES AND SOURCES p. 10

A small brass number points to a note at the back with the method, any exception and the source of the figure.

§

NOTES AND SOURCES

organized by section

Method, exceptions and the source of every figure.

Numbers match the brass markers in the pages, in reading order.

REPORT CARD

1 **Status rule.** FOCUS: lowest in its section when not tied. STRENGTH: highest in its section when not tied. Relative, not a grade. In later years, falling every year also marks FOCUS. Source: HAWKEYE LENS method.

2 **Scales.** Responsibilities and Board partnership use expectations (3 = Meets). Staff and alignment use agreement (3 = Neutral). The two are never compared. Source: instruments A, B, C, L.

3 **Board partnership on the card.** The score is the President's view. The Board's self-review is withheld this year. Source: B1–B6, 2025.

4 **Scope of this edition.** Staff results appear only as averages of 5 or more responses. Comment themes are not included. Source: routing rule.

5 **Alignment gap.** Board average minus staff average on the same statement and scale. Descriptive, not an interval. Source: L1–L6, 2025.

PRESIDENT

6 **President's self-ratings.** One known person, disclosed to the Board before collection. Source: A-self, 2025.

7 **Goals.** Approved December 2024 for the three review years. Values as of 31 October 2025. Source: G1–G3.

8 **Alignment responses.** Board responses per statement range from 5 to 7. The President answered all six. Source: L1–L6, 2025.

BOARD PARTNERSHIP

9 **The President's view.** One person, shared with the Board under the recipient rule agreed before collection. Source: B-president, 2025.

10 **Board self-review.** Fewer than 5 responses, so no count, rate or score is shown. Source: B-board, 2025.

ORGANIZATIONAL HEALTH

11 **Distributions.** Percent of valid responses; "not applicable" is excluded. Source: C3, C7, 2025.

12 **Actions and outcomes.** Status on 31 October 2025. An action completed shortly before the survey closed cannot yet show an effect. Source: ACT1–ACT3.

PRIVACY AND METHOD

13 **Baseline year.** With one year there is no change to report. Change appears from the second review; direction from the third. Source: HAWKEYE LENS method.

14 **Release rule.** Group results need 5 or more responses in the same instrument and year. Years are never combined. Source: HAWKEYE LENS release policy.

15 **Source data.** This is a sample report. The organization, people and all figures are fictional. Source: HAWKEYE LENS sample dataset, first year of the three-year scenario.