THREE-YEAR REVIEW · 2025–2027

Leadership and organizational health

How the President, the Board and staff saw the organization in each of three review years.

Board and President edition

WHO RESPONDED

	2025	2026	2027
Board	7 of 7	7 of 7	7 of 7
Staff	20 of 24	24 of 24	23 of 24
President	self	self	self

Each review year runs from 1 November to 31 October. Group results appear only with 5 or more responses.[19]

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

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Method, exceptions and the source of every figure

AT A GLANCE, 2027

7/7 Board replied
96% Staff replied
2/3 Actions done
1/3 Goals met

REPORT CARD · THREE YEARS AT A GLANCE

everything on one page

Most areas held or improved. Two fell every year and need attention.

Board · President · Staff | first year to 2027, the rated score | other view, 2027

AREA	FIRST YEAR → 2027	2027	CHANGE[1]	PATH	STATUS[2]
PRESIDENT · EIGHT RESPONSIBILITIES[3]	3 Meets · 4 Exceeds				Board average · p. 3
Mission and strategic execution		**4.2**	+0.3	▲ Rose each year	STRENGTH
Board partnership		4.0	+0.2	▲ Rose, then held	
Ethics, risk and compliance		3.8	0.0	– Dipped, recovered	
Program quality and constituent experience		3.5	+0.2	▲ Held, then rose	
Financial stewardship		3.4	0.0	– Rose, then slipped	
Leadership and staff development		3.4	0.0	– Held steady	
Revenue and external relationships		3.2	−0.2	▼ Rose, then slipped	
Communication and trust		**3.1**	−0.3	▼ Fell each year	FOCUS
BOARD PARTNERSHIP · SIX AREAS[4]	3 Meets · 4 Exceeds				President's view · p. 6
Chair communication		**3.7**	0.0	– Held steady	STRENGTH
Direction and expectations		3.5	0.0	– Held steady	
Timely decisions		3.5	0.0	– Held steady	
Authority to manage		3.5	0.0	– Held steady	
Support and resources		3.5	0.0	– Held steady	
Candor and working relationship		3.5	0.0	– Held steady	
ORGANIZATIONAL HEALTH · TEN DOMAINS[5]	3 Neutral · 4 Agree				Staff average · p. 9
Mission and priorities		**4.3**	+0.1	▲ Rose each year	STRENGTH
Quality and responsiveness		4.0	+0.2	▲ Rose each year	
Roles and expectations		3.6	+0.3	▲ Rose each year	
Workload and resources		3.5	0.0	– Held steady	
Communication		3.4	+0.1	▲ New wording 2026	
Learning and improvement		3.3	+0.2	▲ First asked 2026	
Leadership and supervisor support		3.1	−0.1	▼ Rose, then slipped	
Decisions and accountability		3.0	+0.4	▲ Rose each year	
Trust, respect and speaking up		3.0	0.0	– Held steady	
Collaboration and conflict		**2.8**	−0.2	▼ Fell each year	FOCUS
LEADERSHIP ALIGNMENT · WIDEST GAPS[6]	3 Neutral · 4 Agree				Staff average beside Board · p. 4
Understands practical challenges · gap 1.0, wider		**3.0**	−0.2	▼ Fell each year	FOCUS
Follows through on commitments · gap 1.0, narrower		3.0	+0.3	▲ Rose each year	

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

1. Communication and trust has fallen each year, from 3.4 to 3.1. What does the Board need from the President to reverse it, and how will both sides know by the next review? p. 5
2. Staff rate the President's grasp of practical challenges 1.0 below the Board, and that gap has widened each year. How will the Board hear from staff more directly? p. 4
3. Collaboration and conflict has fallen each year, from 3.0 to 2.8, and its pilot was dropped. Who owns the replacement, and by when? p. 11

Reading the report card → How to read, p. 12 · Notes 1–6 → p. 13

PARTICIPATION

All 7 Board members and the President, each year

3 of 7 Board members were new in 2027.[16]

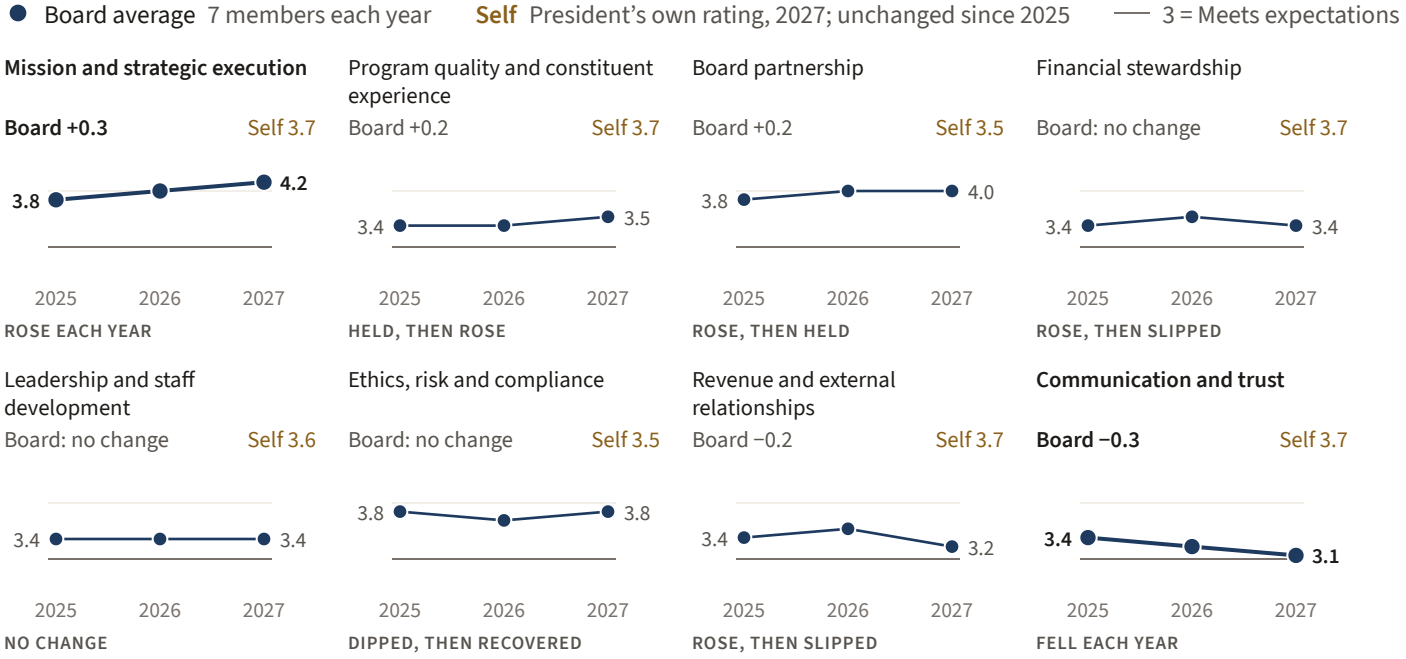
PRESIDENT · THREE-YEAR CAPSTONE

three years of the same eight questions

Mission execution rose. Communication and trust fell each year.

FIGURE 1

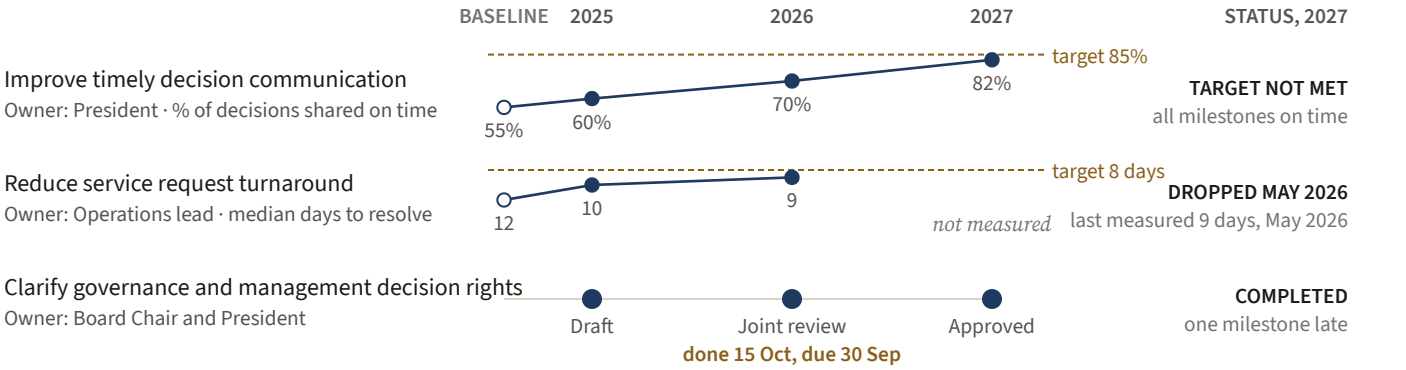
Mission execution rose from 3.8 to 4.2; communication and trust fell from 3.4 to 3.1.



Board average on the 1–5 expectations scale, shown from 2.5 to 4.5; the darker line is 3, Meets · How to read, p. 12 · Notes 1, 7 → p. 13

FIGURE 2

One goal completed, one dropped, one short of target with milestones on time.



Values on 31 October each year; dashed line = approved target · Note 8 → p. 13

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.[6] It shows where experience differs, not who is right.

PRESIDENT · LEADERSHIP ALIGNMENT LENS

the same six statements, three perspectives

Staff and Board differ on four of six statements. One gap is widening.

FIGURE 3

In 2027 the Board agrees with all six statements and staff sit near neutral on four. The President's self-rating is lowest on two.

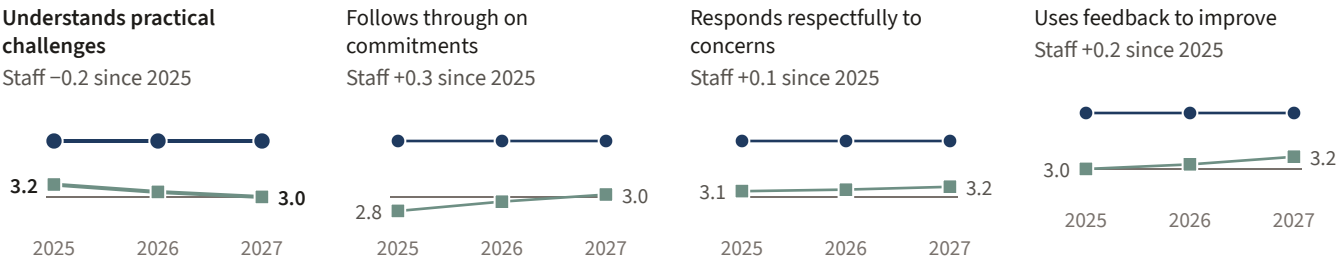
● Board 5–7 each statement ■ Staff 18–23 ◆ President, self one person

STATEMENT, AS ASKED OF ALL THREE GROUPS	2.5 3 Neutral 4 Agree 4.5	GAP 2027	SINCE 2025
The President demonstrates an understanding of the practical challenges in the organization's work.		**1.0**	**wider, from 0.8**
The President follows through on commitments they communicate.		**1.0**	narrower, from 1.3
The President responds respectfully when concerns are raised.		**0.8**	narrower, from 0.9
The President uses feedback to improve how the organization operates.		**0.8**	narrower, from 1.0
The President explains the organization's current priorities clearly.		none	no gap
The President explains the reasons for significant decisions.		none	no gap

Averages on the 1–5 agreement scale, shown from 2.5 to 4.5; the darker tick is 3, Neutral · How to read, p. 12 · Notes 6, 9 → p. 13

FIGURE 4

Staff ratings of practical challenges fell each year while the Board's held at 4.0. Follow-through rose each year.



Staff average (square) beside Board average (circle), 2025 to 2027 · L5 had exactly 5 Board responses, the release minimum · Note 9 → p. 13

WHY THIS PAGE

Communication and trust is the one responsibility that fell in each year. Averages can hide how many people moved.

With 6 or 7 raters, one person changes the picture, so this page shows people, not percentages.[10]

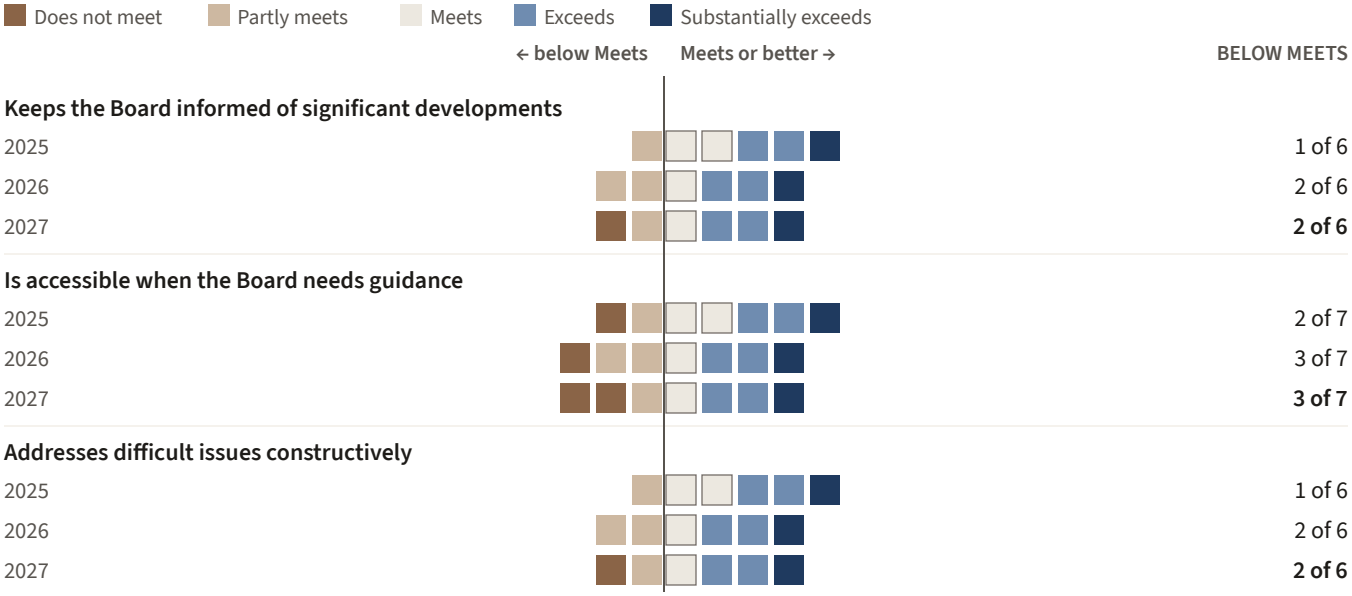
PRESIDENT · COMMUNICATION IN DETAIL

what moved beneath the average

On all three communication items, more Board members rated the President below Meets in 2027 than in 2025.

FIGURE 5

Each square is one Board member's rating. The shift is one or two people per item, not the whole Board.



Board ratings on the expectations scale; "insufficient evidence" answers are excluded · How to read, p. 12 · Notes 10 → p. 13

PROPOSED FOR THE NEXT REVIEW PERIOD

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

1. **Communication and trust**
   Agree with the Board what "kept informed" means in practice, and check it at mid-year rather than waiting for the next review.
2. **Practical challenges**
   Gap with staff 1.0 and widening. Set a regular way for the Board to hear staff experience directly.
3. **Timely decision communication**
   Goal at 82% against a target of 85%, with every milestone on time. Decide whether to carry the target forward.

WHO RATED

The President rated the Board in each year.[11]

The Board rated itself in 2026 and 2027. Too few members responded in 2025 to report.[12]

Recipients Board and President

BOARD PARTNERSHIP · THREE-YEAR CAPSTONE

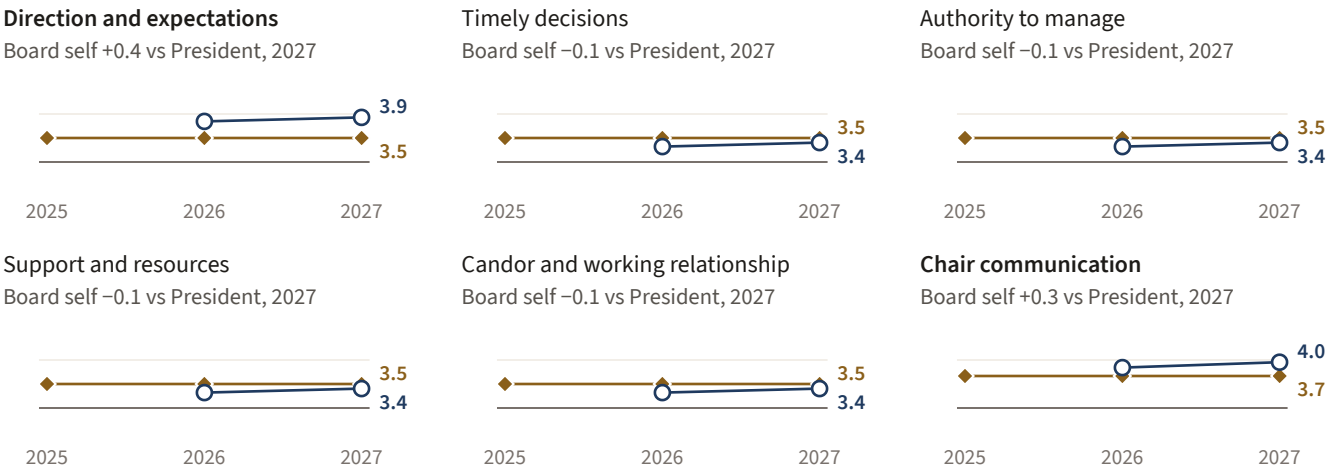
six areas, two perspectives

The President's view of Board support held steady for three years. The Board sees itself slightly more favorably.

FIGURE 6

Six areas of Board support, as the President and the Board each rated them.

◆ President's view one person, every year ○ Board self-review 6–7 members; 2025 withheld, fewer than 5



Averages on the 1–5 expectations scale, shown from 2.5 to 4.5; the darker line is 3, Meets · How to read, p. 12 · Notes 11, 12 → p. 13

THREE FINDINGS

01

The President's view held at 3.5 in five areas, and 3.7 for Chair communication, in every year.

Steady, between Meets and Exceeds. No area rose or fell.

02

The Board rated itself a little higher in 2027 than in 2026 in all six areas.

The Board rates itself above the President in two areas and below in four. → p. 7

03

The widest differences are on two statements, not whole areas.

Realistic expectations, and the Chair keeping personal views separate: Board 3.9, President 3.0.[13] → p. 7

READING THE GAP

Positive: the Board rates itself higher than the President does. Negative: the President rates the Board higher.[13]

The President's rating is one person's view, shared with the Board by agreement.[11]

BOARD PARTNERSHIP · WHERE THE VIEWS DIFFER

thirteen statements, 2027

The Board rates itself higher than the President does on two statements, and lower on four.

FIGURE 7

Each statement in 2027, ordered from the Board's most favorable self-view to the President's.

◆ President's view one person, every year ○ Board self-review 6–7 members; 2025 withheld, fewer than 5

STATEMENT	3 Meets — 4 Exceeds	BOARD MINUS PRESIDENT
The Board sets expectations that are realistic given available resources.		**+0.9**
The Chair distinguishes personal views from decisions made by the Board.		**+0.9**
The Board communicates its decisions clearly to me.		+0.1
Board members follow agreed channels when raising operational concerns.		+0.1
The Board addresses resource requests within its authority.		+0.1
The Board considers my professional advice before reaching decisions.		+0.1
The Board communicates its organizational priorities clearly.		none
The Chair accurately communicates the Board's agreed position.		none
The Chair maintains a regular communication process with me.		none
The Board makes decisions within the time required for effective implementation.		−0.3
The Board respects the management authority delegated to me.		−0.3
The Board follows through on the support it has agreed to provide.		−0.3
I can raise difficult organizational issues candidly with the Board.		−0.3

Exact wording as asked of both · Board self-review 6–7 responses per statement · How to read, p. 12 · Notes 13 → p. 13

SHARED WORK

One goal belongs to the Chair and the President together: decision rights between governance and management.[8]

BOARD PARTNERSHIP · WHAT THE BOARD CAN ACT ON

the Board's part of the work

The shared governance goal was completed. Two statements give the Board its own agenda.

FIGURE 8

Clarify governance and management decision rights: completed in June 2027, one milestone late.



Owner: Board Chair and President · approved December 2024 · Note 8 → p. 13

FIGURE 9

The Board's own ratings rose slightly in every area from 2026 to 2027.

BOARD SELF-REVIEW	2025	2026	2027	CHANGE SINCE 2026
Board members responding	withheld	7 of 7	7 of 7	
Direction and expectations	–	3.8	3.9	+0.1
Timely decisions	–	3.3	3.4	+0.1
Authority to manage	–	3.3	3.4	+0.1
Support and resources	–	3.3	3.4	+0.1
Candor and working relationship	–	3.3	3.4	+0.1
Chair communication	–	3.8	4.0	+0.1

Board average on the 1–5 expectations scale · 2025 is withheld because fewer than 5 members responded; no count or score is shown · Note 12 → p. 13

PROPOSED FOR THE BOARD

For the Board's own discussion. Not yet agreed.

1. **Realistic expectations**
   At budget time, test new expectations against the resources approved for them, with the President in the room.
2. **The Chair's role**
   Agree how the Chair signals a personal view, as distinct from a Board position, in conversations with the President.
3. **Board self-review**
   Keep it annual and encourage every member to respond, so the 2025 gap in the record does not recur.

STAFF PARTICIPATION

2025	83%	20 of 24
2026	100%	24 of 24
2027	96%	23 of 24

Each year is a separate view of current staff, not the same people tracked over time.[16]

ORGANIZATIONAL HEALTH · THREE-YEAR CAPSTONE

three observations, one direction

Four domains rose in each of three years. Collaboration fell in each.

FIGURE 1

Ten domains over three years, ordered from largest rise to largest fall.[1]



Staff average on the 1–5 agreement scale, shown from 2.5 to 4.5 · How to read, p. 12 · Notes 1, 14–16 → p. 13

THREE FINDINGS

01

Decisions and accountability rose each year, from 2.6 to 3.0.

The decision log was completed in Oct 2025, before both later rises. The sequence does not show cause.[18] → p. 11

02

Collaboration and conflict fell each year, from 3.0 to 2.8.

The cross-team handoff pilot was dropped in 2027 and needs a replacement. → p. 11

03

Trust and speaking up held at 3.0 in all three years, with staff split into opposite camps.

An unchanged average here hides a persistent divide, not neutral opinion. → p. 10

02

ORGANIZATIONAL HEALTH · THREE-YEAR CAPSTONE

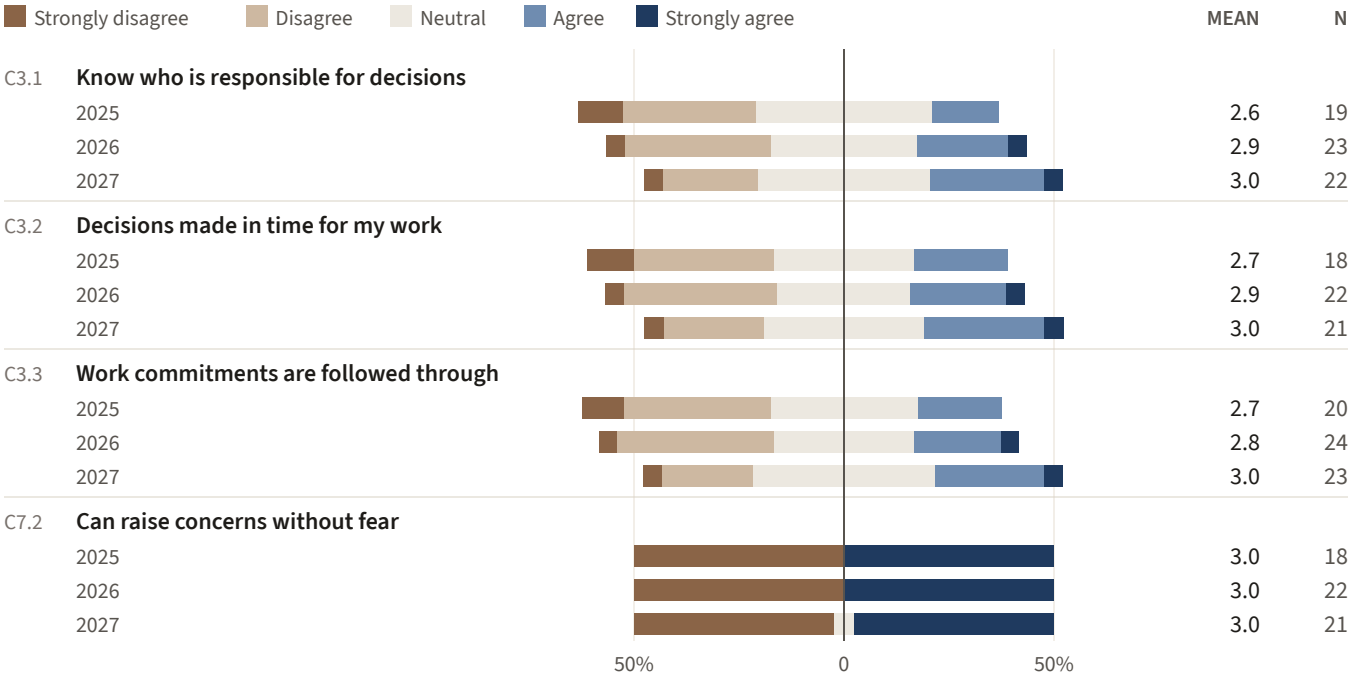
what explains the averages

Decision ratings moved out of disagreement; trust stayed split.

Averages can move for different reasons. This page shows what moved beneath them.

FIGURE 2

Each year, fewer staff disagreed on decision items; the trust item kept two opposite camps.



Percent of valid responses; staff responses per year at right · How to read, p. 12 · Notes 16, 17 → p. 13

FIGURE 3 · COMPARABILITY

One communication item was reworded in 2026, so its 2025 result stands alone.[14]

2025 WORDING · V1

"Changes that affect my work are explained to me."

2026 AND 2027 WORDING · V2

"Changes that affect my work are explained to me before they take effect."

Consequence: Communication is compared only from 2026 to 2027 (+0.1). The 2025 value (3.1) is shown but not compared, and no bridge between wordings is estimated.

03

ORGANIZATIONAL HEALTH · THREE-YEAR CAPSTONE

what was done, and what is next

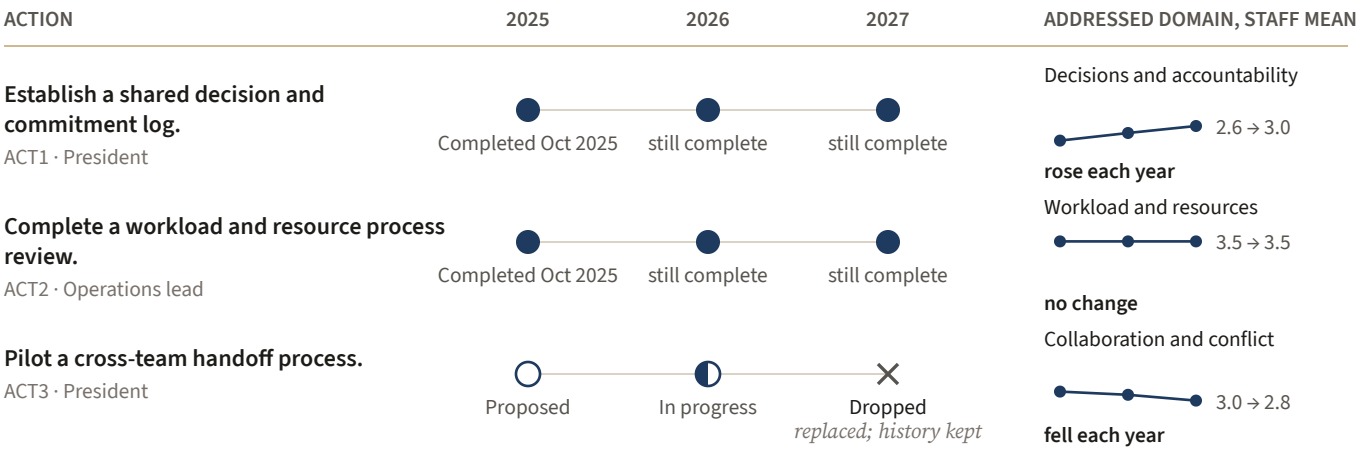
Two of three actions were completed. Collaboration is the unfinished work.

2 actions completed of 3

1 dropped, with the reason kept on record

FIGURE 4

Completed actions sit beside different outcomes; neither line shows that an action caused a change.[18]



Status on 31 October each year; symbols explained on p. 12 · Note 18 → p. 13

PROPOSED FOR THE NEXT PERIOD

Not yet accepted. Owners and dates are set at acceptance.

1. **Collaboration and conflict**
   Design a replacement for the dropped handoff pilot; collaboration fell in each of three years.
2. **Trust, respect and speaking up**
   Commission an independent look at why staff remain split into opposite camps.
3. **Decisions and accountability**
   Keep the decision log in place and review whether the rise continues.

?

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.[3]



REPORT CARD AND STATUS

p. 2

Each row is one area. The line runs from its first comparable year (grey dot) to 2027 (filled mark); the outline is the other group's 2027 view. The darker tick is 3.

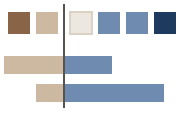
Change is 2027 minus the first comparable year. FOCUS: fell every year, or lowest in its section. STRENGTH: highest and not falling. Not grades.



THREE-YEAR CHARTS

pp. 3, 4, 6, 9

Each small chart shows one area over three years on the same window, so slopes compare directly. A brass slash means the wording changed; values either side are not compared.



PEOPLE AND PERCENTAGES

pp. 5, 10

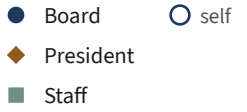
With fewer than 10 raters, each square is one person. With more, bars show percentages split at the middle of the scale: lower ratings left, higher right.



ACTIONS AND GOALS

pp. 3, 8, 11

Filled = completed, half = in progress, open = proposed, × = dropped. Dropped items stay on record. Completing an action and a score changing are shown side by side; neither proves the other.



WHO IS SPEAKING

all pages

The same marker always means the same group. A filled marker is the rating being reported; an outline is another group's view of the same thing. The President's self-rating is one known person.

withheld

PRIVACY

all pages

Group results appear only with 5 or more responses in the same year, and years are never combined to reach 5. A withheld result shows no count, rate or score.

Gap widened.[6]

NOTES AND SOURCES

p. 13

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 **Change and path.** Change is the 2027 value minus the first comparable year, from unrounded values. Path words describe the three annual values. Nothing is tested for statistical significance. Source: trajectories.

2 **Status rule.** FOCUS: fell every measured year, or lowest in its section when not tied. STRENGTH: highest in its section and not falling. Relative, not a grade. Source: HAWKEYE LENS method.

3 **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.

4 **Board partnership on the card.** The rated score is the President's view; the outline is the Board's self-review, first reportable in 2026. Source: B1–B6, 2025–2027.

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

6 **Alignment gap.** Board average minus staff average on the same statement and scale. Descriptive, not an interval. Source: L1–L6, 2025–2027.

PRESIDENT

7 **President's self-ratings.** One known person, disclosed to the Board before collection. Identical in all three years, so shown for 2027 only. Source: A-self, 2025–2027.

8 **Goals.** Targets as approved in December 2024. G2 was dropped in May 2026. G3 is shared by the Chair and President. Source: G1–G3.

9 **Alignment responses.** Board responses per statement range from 5 to 7; L5 had exactly 5. The President did not answer L6 in 2026. Source: L1–L6 item results.

10 **People, not percentages.** Below 10 raters each square is one person. "Insufficient evidence" answers are excluded. Source: A4.1–A4.3.

BOARD PARTNERSHIP

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

12 **Board self-review, 2025.** Fewer than 5 responses, so no count, rate or score is shown. Comparisons begin in 2026. Source: B-board 2025.

13 **Board minus President.** Positive: the Board rates itself higher than the President rates it. Source: B items 2027.

ORGANIZATIONAL HEALTH

14 **Communication wording.** Item C4.2 was reworded in 2026, so 2025 is shown but not compared. Source: C4.2 v1, v2.

15 **Learning and improvement.** First asked in 2026; change covers 2026 to 2027. Source: C10.

16 **Repeated views.** Each year asks current staff and Board, not the same people. Three Board members and some staff were new in 2027. Source: cycle context.

17 **Distributions.** Percent of valid responses; "not applicable" is excluded. Source: C3, C7.2.

18 **Actions and outcomes.** Status on 31 October each year. Completion and score change are separate facts; the order does not show cause. Source: ACT1–ACT3.

PRIVACY AND METHOD

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

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