

Comparative Board Report Timeline



The CBR process takes approximately 12 weeks from start to finish.

Foundation Responsibilities

- Contact information for trustees sent to CEP.
- Trustees contacted by CEO/board chair and informed of process.
- Foundation-specific questions and categories added to survey.
- Trustees have 3 weeks to complete survey and return it to CEP.

★ Phone call with CEO/board chair to discuss draft version of report



CEP Responsibilities

Weeks 1 – 2	Weeks 3 – 5	Weeks 6 – 9	Weeks 10 – 11	Week 12+
<p>Surveys customized and mailed to trustees and CEO</p> <ul style="list-style-type: none"> • Survey and CBR process discussed with CEO and/or board chair. • Background on trustee role and board structure shared with CEP. • Surveys printed and mailed to trustees and CEO. 	<p>Trustees respond to and return surveys</p> <ul style="list-style-type: none"> • CEP staff available to answer any questions trustees may have while completing survey. • CEP staff update CEO about the receipt of completed surveys. 	<p>Analysis of data and preparation of CBR</p> <ul style="list-style-type: none"> • Data entered and analyzed and draft version of the report created. • Draft of CBR sent to Foundation for review. 	<p>Revision of CBR based on feedback from Foundation</p> <ul style="list-style-type: none"> • CEP will perform any additional analysis and update the CBR to reflect recommendations following a preliminary call with the Foundation. • Final version of CBR sent to Foundation. 	<p>Presentation of CBR and facilitation of Board discussion</p>