**Unit Performance Matrix**

Updated 7/2022

*This score card outlines best practices and CEC Headquarters expectations of their Unit.*

**Strategy**

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|  | Not Demonstrated | Below Expectations | Meets Expectations | Exceeds Expectations | Notes |
| **Strategic Plan** | Unit does not track progress or does not have a strategic plan. | Unit has strategic plan.  Progress is rarely evaluated or tracked in meeting minutes. | Unit has strategic plan and it is reviewed at most board meetings to drive conversation, establish goals, and evaluate progress.  Unit website includes strategic plan. | Unit has strategic plan; strategic plan is reviewed at every board meeting to drive conversation, establish goals, and evaluate progress.  Unit website includes strategic plan and is updated with progress made. |  |
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**Operations**

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|  | | Below Expectations | | | Meets Expectations | | Notes | | |
| **Form 990** | | Unit did not submit Form 990 on time/did not submit. | | | Unit completed and submitted Form 990 on time. | |  | | |
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| **Non-Profit Status** | | Unit does not have non-profit status in their state/province. | | | Unit has non-profit status in their state/province. | |  | | |
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|  | Not Demonstrated | | Below Expectations | Meets Expectations | | Exceeds Expectations | | Notes | |
| **Budget** | Unit does not have a budget. | | Unit has a budget but is unbalanced or is not updated with spending and revenue details | Unit has a balanced budget and updates spending/revenue details regularly. | | Unit has a balanced budget and updates spending/revenue details regularly. Budget is reviewed at every board meeting. | |  |
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| **Bylaws,**  **Policy Manual, and**  **Operations Manual** | Unit does not have bylaws. | | Unit has bylaws that have not been reviewed or updated in over a year. | Unit has Bylaws which are reviewed and updated annually.  The Unit also uses a policy manual. | | Unit has Bylaws which are reviewed and updated annually. The Unit also uses a policy manual. Both of these are available on Unit’s website.  The Unit uses an operations manual to support officers and Unit functions. | |  |
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**Definitions:**

* **Bylaws**  
  (approved by membership, contains what is necessary to run the organization (Board composition, term limits, officers, etc.)
* **Policy Manual** (approved by the Board and creates frameworks of authority for decision-making between Board meetings)
* **Operations Manual** (requires no approval; outlines day-to-day work, processes and timelines for roles and regularly occurring processes (such as election timelines and awards processes)

**Board Management**

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|  | | Below Expectations | | Meets Expectations | | Notes | |
| **Term Limits** | | Term limits are not in place or are outlined in governing document but not followed. | | Term limits are in place, outlined in governing documents, and are followed. | |  | |
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| **Elections** | | Election cycles and eligibility requirements are not outlined in governing documents. | | Election cycles and eligibility requirements are outlined in governing documents. | |  | |
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| **Position Descriptions** | | Unit does not have board member position descriptions outlined. | | Every board member has a detailed and up-to-date position description and is outlined in governing documents or manuals. | |  | |
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| **Board Orientation** | | Unit does not conduct a board member orientation. | | Unit conducts a board member orientation that includes incoming and outgoing board members. All board members are transitioned by their predecessor and are provided with resources and necessary tools to perform their role. | |  | |
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|  | Not Demonstrated | | Below Expectations | Meets Expectations | Exceeds Expectations | | Notes |
| **Volunteer Square** | Board members do not/do not know how to use Volunteer Square. | | Volunteer Square is used inconsistently for soliciting and recruiting volunteers in all volunteer opportunities. | Volunteer Square is used for soliciting and recruiting volunteers in all volunteer opportunities. | Board members know how to use and promote Volunteer Square on their website. Volunteer Square is used for soliciting and recruiting volunteers in all volunteer opportunities. | |  |
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**Professional Development**

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|  | Not Demonstrated | Below Expectations | Meets Expectations | Exceeds Expectations | Notes |
| **Unit-created Professional Development (PD) Programs and Resources** | Unit does not offer professional development programming or resources. | Unit offers one or more PD programs or resources to its members. | Unit offers 2 or more PD programs or resources to its members annually (may include a D/U’s annual conference). | D Unit offers 4 or more PD programs or resources to its members annually (may include a Unit’s annual conference). |  |
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| **Use of CEC-Created Professional Development (PD) Programs and Resources** | Unit does not use PD programming or resources provided by CEC HQ for member programming/PD. | Unit highlights some PD programming or resources provided by CEC HQ to its members. | Unit highlights PD programming or resources provided by CEC HQ to its members. | Unit highlights or repackages PD programming or resources provided by CEC HQ to its members.  Unit offers debriefing sessions, book clubs, and/or continued conversation via social media or CECommunity platforms upon program conclusion. |  |
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**Programming**

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|  | Not Demonstrated | Below Expectations | Meets Expectations | Exceeds Expectations | Notes |
| **Advocacy** | Unit does not have a policy/advocacy plan, group of active advocates nor do they communicate policy updates to members. | Unit has a group of active advocates but does not have a policy/advocacy plan.    OR    Unit has a policy/advocacy plan but does not have a group of active advocates. | Unit has a policy/advocacy plan and active advocates who can implement the plan.  AND  Unit consistently communicates policy updates to its members and engages advocates through its communications and social media platforms. | Unit has a strong policy/advocacy plan and a group of active advocates who can implement the plan.  AND  Unit engages advocates in two-way communications and provides consistent policy updates through its communications and social media platforms. |  |
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| **Networking** | Unit does not offer networking opportunities. | Unit offers networking opportunities at least once a year. | Unit offers networking opportunities at least twice per year. | Unit offers quarterly networking opportunities. |  |
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**Communications and Branding**

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|  | Below Expectations | Meets Expectations | Notes |
| **Official CEC Logo** | Unit does not use an official CEC logo. | Unit uses an official CEC logo. |  |
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| **Communication Plan/Strategy** | Unit does not have a communication plan/strategy. | Unit has a communication plan/strategy. |  |
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| **Branding** | Unit does not adhere CEC approved colors and branding guidelines. | Unit adheres to CEC approved colors and branding guidelines. |  |
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|  | Not Demonstrated | Below Expectations | Meets Expectations | Exceeds Expectations | Notes |
| **Website** | Unit does not have a website. | Unit has a website that is updated less than every three months. | Website is updated at least every 3 months updated with board member contact information, upcoming event details, volunteer opportunities and social media handles/links. | Website is updated monthly with board member contact information, strategic plan, upcoming event details, volunteer opportunities and social media handles/links. Website is promoted as *the* source of information for members. |  |
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| **Social Media** | Unit does not use social media platforms. | Unit’s social media lacks strategy and is not updated/used weekly. | Unit’s social media lacks strategy but is updated/used twice weekly. | Unit uses various social media platforms strategically by updating and promoting programs and initiatives relevant to the D/U’s strategic plan multiple times a week. |  |
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| **Member Communication** | Unit does not communicate with its members annually. | Unit communicates with its members quarterly. | Unit communicates with its members bi-monthly. | Unit communicates with its members monthly. |  |
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**Member Engagement**

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|  | Below Expectations | Meets Expectations | Notes |
| **Renewals and Lapsed Members** | Unit does not reach out to members who let their membership lapse. | Unit reaches out to members who let their membership lapse with information regarding the membership renewal process. |  |
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| **Website Membership Registration Page** | Unit’s website does not link back to CEC’s membership registration page. | Unit’s website links back to CEC’s membership registration page. |  |
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|  | Not Demonstrated | Below Expectations | Meets Expectations | Exceeds Expectations | Notes |
| **New Member Welcome Letters and Onboarding** | Unit does not send a welcome letter to new members. | Unit sends a Welcome Letter to new members but does not send on a regular basis/does not have an assigned board member or committee to execute. | Unit sends Welcome letters to new members on a regular basis and has an assigned board member or committee that executes this task. | Unit sends Welcome letters to new members on a regular basis and has an assigned board member or committee that executes this task.  Unit conducts additional programs and events that support new member onboarding and acclimation to CEC and their Unit, such as mentorship programs, board meet and greets, new member meet and greets, etc. |  |
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| **Membership Data** | Leadership does not know how to pull membership data from Unit Community and membership reports. | Leadership knows how to pull membership data from Unit Community and membership reports but does not review data. | Leadership pulls and reviews membership data from Unit Community and membership reports monthly. | Leadership pulls and reviews membership data from Unit Community and membership reports monthly. The board also compares data to previous months/years, reviews retention rates, etc. |  |
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