

## Executive Director Evaluation Survey Form

[This is the editable survey form mentioned in the article published November 15, 2011.]

### Process

- A. The board should assign a small group or one person to managing the ED's evaluation. This can be the officers, or a task force created for the job.
- B. The ED should go over the process and instrument(s) with that committee prior to the start. This can be as simple as an email or as deep as a group discussion about goals of the evaluation.
- C. The board can collect the information from respondents. Rather than compile an "average," it's important to report how many board members marked "outstanding," how many marked "needs improvement," and so forth. Having all board members mark "fine" is quite different from half of them marking "outstanding" while another half mark "improvement needed."
- D. An executive session of the board (perhaps 1 hour without any staff present) to discuss the survey results and comments in general.
- E. Relaying the information to the executive: by the board chair or another assigned member or two.
- F. The executive's chance to respond (in person or in writing) to the full board.
- G. The review and the response (if there is one) are placed in the executive's personnel file.

**TIP:** Involve HR to make sure the review takes place. Most supervisors would not complete reviews of their staff if there were not someone from HR reminding and nagging them. An HR or finance staff person can keep reminding the board officers that a review must be completed for the executive's personnel file and that salary documentation must be provided.

Please do not use any of these templates "as is." Instead, use them as a basis for forms that are relevant to your organization's circumstances:

1. OVERALL ORGANIZATIONAL PERFORMANCE	OUTSTANDING	VERY GOOD	FINE	IMPR NEEDED	DON'T KNOW
a. Works with the board and management staff to develop strategies for achieving mission goals and financial viability.					
b. Appropriately provides both support and leadership to board.					
c. Demonstrates quality of analysis and judgement related to progress and opportunities, and need for changes.					
d. Maintains and utilizes a working knowledge of significant developments and trends in the field (examples: AIDS/HIV, environmental law).					
e. Builds respect and profile for the organization in its various constituencies. Supports the overall field/movement in which the organization works.					
f. Establishes ambitious goals for excellence and impact and initiates, maintains, and adapts programs with excellence and impact.					
g. Comments on overall organizational performance:					

<b>2. COMMUNITY LEADERSHIP</b>	OUTSTANDING	VERY GOOD	FINE	IMPR NEEDED	DON'T KNOW
a. Serves as an effective spokesperson. Represents the organization well to its constituencies, including clients/members/patrons, other nonprofits, government agencies, elected officials, funders, and the general public.					
b. Establishes and makes use of working relationships with organizations and individuals in the field.					
c. Sees that communication vehicles are developed and utilized well.					
d. Comments on community leadership:					

<b>3. ADMINISTRATION AND HUMAN RESOURCES</b>	OUTSTANDING	VERY GOOD	FINE	IMPR NEEDED	DON'T KNOW
a. Establishes and leads an effective management team.					
b. Recruits and retains a diverse staff (as the organization has identified diversity).					
c. Maintains appropriate balance between programs and administration.					
d. Ensures that procedures and organizational culture maximize volunteer involvement.					
e. Ensures compliance with relevant workplace and employment laws.					
f. Sees that employees are licensed and credentialed as required and that appropriate background checks are conducted.					
g. Leads staff in maintaining a climate of excellence, accountability, and respect.					
h. Comments on administration and HR:					

4. FINANCIAL SUSTAINABILITY AND MISSION IMPACT	OUTSTANDING	VERY GOOD	FINE	IMPR NEEDED	DON'T KNOW
a. Assures adequate control and accounting of all funds, including maintaining sound financial practices.					
b. Sees that program and activities are developed, executed, modified, and dismantled to maximize mission impact.					
c. Works with the staff, finance committee and the board to prepare budgets, monitor progress, and initiate changes (to operations and/or to budgets) as appropriate.					
d. Sees that official records and documents are retained; sees to compliance with federal state and local regulations (examples: Form 990, payroll withholding).					
e. Develops realistic, ambitious plans for acquiring funds.					
f. Jointly with the President and Secretary of the board, conducts official correspondence for the organization, and jointly with designated officers, executes legal documents appropriately.					
g. Successfully involves others in fundraising and in earned income generation.					
h. Establishes positive relationships with institutional funders, such as foundations, government agencies, churches, corporations, and so forth.					
i. Establishes positive relationships with individual donors.					
j. Comments on financial sustainability and mission impact:					



5. BOARD OF DIRECTORS	OUTSTANDING	VERY GOOD	FINE	IMPR NEEDED	DON'T KNOW
a. With the Board Chair, appropriately involves/does not involve board members in decisions.					
b. Provides appropriate leadership to the board.					
c. Sees that board members are kept fully informed in a timely way on the condition of the organization and important factors influencing it.					
d. Sees that board committees are appropriately supported.					
e. Works with the board officers to ensure that the board is effective as a body and that recruitment, involvement and departures of individual board members are effective.					
f. Comments on the Board:					

**6. Are there additional comments you would like to make that are not within the above categories?**

## SENIOR STAFF ON EXECUTIVE DIRECTOR REVIEW

Please help the Board of Directors conduct its review of the Executive Director's performance over the last year by sharing your thoughts. Your comments will be shared with members of the Board of Directors, but your name will not be identified with specific comments.

Please submit this to [insert name] via [describe preferred method] by [insert date].

1. Overall organizational performance

2. Community leadership

3. Administration and HR

4. Financial sustainability and mission impact

5. Board of Directors

6. Miscellaneous

7. Are there any specific suggestions for professional development or individual work plan that the board might consider recommending to the Executive Director?

