

# Executive Director Evaluation Process

Evaluating the performance of an Executive Director is a crucial process to ensure the organization's effectiveness and sustainability. A good process encourages a holistic assessment of the Executive Director's performance, allows you to set goals for improvement, and promotes ongoing professional development.

In this resource, I have provided a sample evaluation form that you can use or modify to suit your specific needs. This form includes various categories and questions to assess the Executive Director's performance.

## **Establish an Evaluation Committee**

Form a committee to oversee the evaluation process. This may include Board members, senior staff, and other key stakeholders. This committee should be diverse and represent various perspectives within the organization.

## **Define Evaluation Criteria**

Work with the committee to define clear and measurable criteria for evaluating the Executive Director's performance. These criteria should be aligned with the organization's mission, goals, and strategic objectives.

## **Gather Input**

Seek input from various stakeholders, including board members, staff, donors, volunteers, and community members. Use surveys, interviews, and other feedback mechanisms to collect their perspectives on the Executive Director's performance.

## **Review Job Description and Expectations**

Ensure that the Executive Director's job description and performance expectations are up-to-date and aligned with the organization's needs and strategic priorities.

## Set SMART Goals

Collaborate with the Executive Director to set specific, measurable, achievable, relevant, and time-bound (SMART) goals for the evaluation period. These goals should reflect the organization's strategic priorities.



## Develop a Performance Evaluation Form

Create a standardized performance evaluation form or questionnaire that includes the defined criteria, goals, and a rating scale. This form will serve as the basis for the evaluation. A sample form is included at the end of this resource.



## Conduct Regular Check-Ins

Throughout the evaluation period, schedule regular check-in meetings with the Executive Director to discuss progress, challenges, and accomplishments. These meetings can provide an opportunity for ongoing feedback and adjustment.

## Collect Data and Feedback:

Collect and compile data from surveys, interviews, and other feedback sources. Ensure that feedback is anonymous, where necessary, to encourage honest and candid responses.

## Evaluation Meeting

Schedule a formal evaluation meeting with the Executive Director. Present the evaluation form and discuss the results, highlighting areas of strength, and areas needing improvement.

## Development Plan

Collaboratively develop a professional development plan with the Executive Director based on the evaluation results. This plan should include strategies for addressing any identified weaknesses and building on strengths.





## **Board Review and Approval**

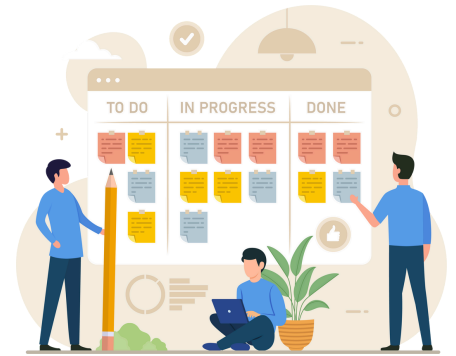
Share the evaluation results and development plan with the Board of Directors for review and approval. The Board's support is crucial in ensuring that the Executive Director has the necessary resources and support to meet the Board's expectations.

## **Follow-Up**

Implement the development plan, and schedule regular follow-up meetings to track progress. Continue to provide feedback and support as needed.

## **Repeat Annually**

Conduct the Executive Director evaluation annually to ensure continuous improvement and alignment with the organization's evolving goals and needs.



You will find a sample evaluation form on the next pages.

After the evaluation forms are completed, it's important to schedule a meeting between the Board Chair and the Executive Director to discuss the results, provide constructive feedback, and set goals for the future. This feedback process can help the Executive Director enhance their performance and contribute to the nonprofit's success.

# Sample ED Evaluation Form

[Your Organization's Letterhead]

**Instructions:** This evaluation form is designed to assess the performance of the Executive Director of [Your Nonprofit Organization]. Please provide a rating using the scale outlined. Provide objective, honest and constructive feedback for each rated area. Your input is valuable and will help guide the Executive Director's professional development and the organization's growth.

## Executive Director Information:

- Executive Director's Name:
- Position Start Date:
- Date Range of Evaluation Period:

## Evaluator Information:

- Evaluator's Name:
- Position:
- Date:

**Rating Scale:** Please rate the Executive Director's performance in each area on a scale of 1 to 5, with 1 being "Unsatisfactory" and 5 being "Outstanding."

- 1: Unsatisfactory
- 2: Needs Improvement
- 3: Satisfactory
- 4: Good
- 5: Outstanding

## I. Leadership and Vision

- Sets a clear vision for the organization's mission and goals.
  - Rating (1-5):
  - Comments:
  
- Demonstrates strong leadership skills and leads the organization effectively.
  - Rating (1-5):
  - Comments:

## **II. Strategic Planning**

- Develops and implements effective strategic plans.
  - Rating (1-5):
  - Comments:
  
- Ensures alignment of the organization's activities with its mission and goals.
  - Rating (1-5):
  - Comments:

## **III. Financial Management**

- Manages the organization's finances responsibly and transparently.
  - Rating (1-5):
  - Comments:
  
- Demonstrates the ability to secure funding and manage budgets effectively.
  - Rating (1-5):
  - Comments:

## **IV. Program and Operations Management**

- Oversees and improves the quality and impact of the organization's programs.
  - Rating (1-5):
  - Comments:
  
- Manages the day-to-day operations efficiently and responsibly.
  - Rating (1-5):
  - Comments:

## **V. Fundraising and Resource Development**

- Successfully raises funds and diversifies revenue sources.
  - Rating (1-5):
  - Comments:
  
- Cultivates and maintains relationships with donors, supporters, and partners.
  - Rating (1-5):
  - Comments:

## **VI. Communication and Advocacy**

- Effectively communicates the organization's mission and impact to stakeholders.
  - Rating (1-5):
  - Comments:
  
- Advocates for the organization and its mission in the community and with policymakers.
  - Rating (1-5):
  - Comments:

## **VII. Board Relations**

- Collaborates well with the board of directors and keeps them informed.
  - Rating (1-5):
  - Comments:
  
- Supports the board's governance and development efforts.
  - Rating (1-5):
  - Comments:

## VIII. Staff and Team Management

- Manages and supports staff effectively, promoting a positive work culture.
  - Rating (1-5):
  - Comments:
  
- Encourages professional growth and development among the team members.
  - Rating (1-5):
  - Comments:

## IX. Professional Development

- Engages in ongoing professional development to improve leadership skills.
  - Rating (1-5):
  - Comments:

## X. Overall Performance

- Overall, how would you rate the Executive Director's performance for the past year?
  - Rating (1-5):

**Additional Evaluator Comments:** Please provide any additional comments, suggestions, or recommendations for the Executive Director's improvement. Use a separate sheet to outline specific developmental goals along with expected timeframes.

**Executive Director Comments:** We encourage the Executive Director to provide any comments they'd like to share related to the evaluation. A separate sheet can be used and then attached to this form.

### Signatures:

- Evaluator's Signature:
- Date:
- Executive Director's Signature:
- Date:

Provide a copy of signed evaluation to Executive Director and then place a copy in personnel file, along with any of the additional sheets that may need to be attached.