

Tab 1

Executive Director Performance Evaluation Matrix

Performance Rating Scale

Rating	Definition
5 - Far Exceeds Expectations	Consistently delivers exceptional results; serves as a model for others to follow
4 - Exceeds Expectations	Consistently delivers results higher than expectations
3 - Meets Expectations	Consistently meets expectations in all areas (minimum expectation for job performance)
2 - Partially Meets Expectations	Meets expectations in some areas but needs improvement in others
1 - Does Not Meet Expectations	Requires significant and immediate improvement

1. MISSION ALIGNMENT

Objective: Ensure organizational activities directly advance the mission.

Clients Served through Clinic

What This Measures: Total number of individuals served annually through clinic services; year-over-year percentage increase. *Excludes expunction clinic and other non-VLS clinics.*

Meets Expectations (3)	Exceeds Expectations (4-5)	Rating	Notes
2% growth	3%+ growth		

Clients Served through Representation

What This Measures: Total number of individuals represented annually through direct legal representation; year-over-year percentage increase.

Meets Expectations (3)	Exceeds Expectations (4-5)	Rating	Notes
2% growth	3-5%+ growth		

Client Satisfaction through Representation

What This Measures: Average survey score with $\geq 80\%$ rating “satisfied” or “very satisfied”

Implementation: *If data not currently collected: Implement a requirement to send surveys to clients before case closure and begin tracking this metric.*

Meets Expectations (3)	Exceeds Expectations (4-5)	Rating	Notes
≥80% satisfied/very satisfied	≥90% satisfied/very satisfied		[NEW METRIC]

Client Satisfaction through Clinic

What This Measures: Average survey score with ≥80% rating “satisfied” or “very satisfied”

Implementation: *If data not currently collected: Implement requirement to send surveys to clinic clients after they attend and begin tracking this metric.*

Meets Expectations (3)	Exceeds Expectations (4-5)	Rating	Notes
≥80% satisfied/very satisfied	≥90% satisfied/very satisfied		[NEW METRIC]

Service Quality Indicators

What This Measures: Cases successfully closed with favorable outcomes vs. total cases opened; demonstrates effectiveness of service delivery beyond volume.

Meets Expectations (3)	Exceeds Expectations (4-5)	Rating	Notes
≥85% case completion rate	≥92% case completion rate		[NEW METRIC]

Overall Mission Alignment Rating: _____ / 5

Evaluator Comments:

2. FINANCIAL MANAGEMENT

Objective: Maintain strong fiscal health and sustainability.

Budget Variance

What This Measures: Actual spending within approved annual budget parameters across all expense categories.

Meets Expectations (3)	Exceeds Expectations (4-5)	Rating	Notes
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Within $\pm 5\%$ of approved annual budget	Within $\pm 3\%$ of approved annual budget
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Cash Flow Management

What This Measures: Organization maintains positive monthly cash flow without dipping into investment reserve accounts.

Meets Expectations (3)	Exceeds Expectations (4-5)	Rating	Notes
Positive monthly cash flow; no reserve withdrawals	Positive cash flow + 10% operating reserve increase		

Individuals Served Cost Benchmark

What This Measures: The baseline cost of serving a single individual, calculated by dividing total expenses by plaintiffs served annually.

Purpose: Serves as a key operational health metric, indicating whether resources are being optimized as service volume changes.

Meets Expectations (3)	Exceeds Expectations (4-5)	Rating	Notes
Maintain or decrease $\geq 3\%$ YoY	Decrease $\geq 5\%$ YoY		

Financial Reporting Accuracy

What This Measures: Timely and accurate monthly financial reports submitted to Board; no material errors identified.

Meets Expectations (3)	Exceeds Expectations (4-5)	Rating	Notes
100% accurate monthly reports; no material errors	Enhanced reporting with trend analysis		[NEW METRIC]

Audit Performance

What This Measures: Results of annual independent audit including any findings or management letter recommendations.

Meets Expectations (3)	Exceeds Expectations (4-5)	Rating	Notes
Clean audit with no findings	Clean audit + implementation of auditor recommendations		[NEW METRIC]

Overall Financial Management Rating: _____ / 5

Evaluator Comments:

3. FUNDRAISING

Objective: Ensure the financial sustainability and growth of the organization through effective fundraising strategy, donor engagement, and partnership development.

Fundraising Strategy & Revenue Growth

What This Measures: Development and execution of an annual fundraising plan aligned with organizational goals and budget needs. Achieve year-over-year fundraising growth and meet or exceed all Board-approved revenue goals.

Meets Expectations (3)	Exceeds Expectations (4-5)	Rating	Notes
Plan developed, implemented, tracked quarterly; $\geq 5\%$ YoY growth; meet Board goals	Plan achieved + innovations; $\geq 8\%$ YoY growth		

Funding Diversification

What This Measures: Maintain a balanced mix of revenue sources — including grants, law firm contributions, individual donors, and fundraising events — ensuring no single source exceeds 35% of total annual income.

Meets Expectations (3)	Exceeds Expectations (4-5)	Rating	Notes
No single source $> 35\%$ of total income	No single source $> 30\%$; 4+ revenue streams		

Grant Management - Submissions & Reports

What This Measures: Submit 100% of grant applications and required reports on time.

Meets Expectations (3)	Exceeds Expectations (4-5)	Rating	Notes
100% on-time submission	100% on-time + submitted early		

Grant Management - New Opportunities

What This Measures: Locate new grants to submit and communicate with board on needs.

Meets Expectations (3)	Exceeds Expectations (4-5)	Rating	Notes
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Research ≥ 5 new opportunities; present to Board	Research ≥ 8 + submit ≥ 3 new applications	[NEW METRIC]
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Grant Management - Success Rate

What This Measures: Maintain a $\geq 80\%$ success or renewal rate for institutional funders.

Meets Expectations (3)	Exceeds Expectations (4-5)	Rating	Notes
$\geq 80\%$ success/renewal rate	$\geq 85\%$ success/renewal rate		

Donor Retention & Stewardship - Retention Rate

What This Measures: Maintain a donor retention rate of $\geq 70\%$. Retain $\geq 70\%$ of prior-year donors.

Meets Expectations (3)	Exceeds Expectations (4-5)	Rating	Notes
$\geq 70\%$ retention rate	$\geq 75\%$ retention rate		

Donor Retention & Stewardship - Acknowledgment

What This Measures: Ensure all donors receive acknowledgment within 5 business days.

Meets Expectations (3)	Exceeds Expectations (4-5)	Rating	Notes
100% acknowledged within 5 business days	100% within 3 days + personalized outreach		

Donor Retention & Stewardship - New Donors

What This Measures: Bring in new donors - a rate of 15 new donors in the first year.

Meets Expectations (3)	Exceeds Expectations (4-5)	Rating	Notes
≥ 15 new donors annually	≥ 25 new donors annually		

Partnerships & Events - Partnerships

What This Measures: Maintain or expand at least five active partnerships (law firms, bar associations, or community groups).

Meets Expectations (3)	Exceeds Expectations (4-5)	Rating	Notes
Maintain ≥ 5 active partnerships	Expand to ≥ 7 + 1 new significant partner		

Partnerships & Events - Event Revenue

What This Measures: Meet $\geq 90\%$ of fundraising event revenue targets.

Meets Expectations (3)	Exceeds Expectations (4-5)	Rating	Notes
$\geq 90\%$ of event revenue targets	$\geq 100\%$ of targets + improved net revenue		

Overall Fundraising Rating: _____ / 5

Evaluator Comments:

4. STAFF MANAGEMENT

Objective: Build and sustain a high-performing, engaged team.

Staff Retention

What This Measures: Annual turnover rate (target $< 10\%$).

Meets Expectations (3)	Exceeds Expectations (4-5)	Rating	Notes
$< 10\%$ annual turnover	$< 5\%$ annual turnover		Exclude planned retirements

Staff Engagement

What This Measures: Average staff satisfaction survey score (target $\geq 80\%$). Ask Alisa for copies of staff reviews of the ED's performance.

Implementation: *If data not currently collected: Institute annual employment satisfaction/feedback surveys to capture engagement metrics.*

Meets Expectations (3)	Exceeds Expectations (4-5)	Rating	Notes
$\geq 80\%$ satisfaction score	$\geq 85\%$ satisfaction score		[CLARIFIED] Obtain staff reviews of ED

Performance Review Completion

What This Measures: 100% of staff performance evaluations completed annually with documented professional development plans.

Meets Expectations (3)	Exceeds Expectations (4-5)	Rating	Notes
100% completed on time with dev plans	100% on time + documented skill development achieved		

Professional Development

What This Measures: All staff have documented training and development goals with opportunities to complete development activities.

Meets Expectations (3)	Exceeds Expectations (4-5)	Rating	Notes
All staff have documented training/development goals	≥75% of staff complete development activities		[NEW METRIC]

Staff Communication

What This Measures: Regular team meetings and one-on-one check-ins held consistently to maintain open communication.

Meets Expectations (3)	Exceeds Expectations (4-5)	Rating	Notes
Weekly team meetings; monthly 1-on-1s held	Proactive communication + staff feedback implemented		[NEW METRIC]

Succession Planning

What This Measures: Cross-training plan documented for key roles to ensure organizational continuity.

Meets Expectations (3)	Exceeds Expectations (4-5)	Rating	Notes
Cross-training plan documented for key roles	Plan implemented with backup capacity demonstrated		[NEW METRIC]

Overall Staff Management Rating: _____ / 5

Evaluator Comments:

5. VOLUNTEER ENGAGEMENT

Objective: Recruit, retain, and engage a strong volunteer base to expand organizational capacity.

Volunteer Recruitment

What This Measures: Number of new volunteers onboarded annually, compared to previous year.

Meets Expectations (3)	Exceeds Expectations (4-5)	Rating	Notes
2% YoY growth	3%+ YoY growth		

Volunteer Retention

What This Measures: Percentage of volunteers retained year-over-year (target $\geq 70\%$).

Alternative measure: Number of volunteers who have taken more than two cases annually, or attended three clinics in a year (to track how engaged volunteers are in the organization).

Meets Expectations (3)	Exceeds Expectations (4-5)	Rating	Notes
$\geq 70\%$ retained YoY	$\geq 75\%$ retained YoY		

Volunteer Activity Level

What This Measures: Percentage of volunteers who take 2+ cases or attend 3+ clinics annually to assess engagement depth.

Meets Expectations (3)	Exceeds Expectations (4-5)	Rating	Notes
$\geq 50\%$ take 2+ cases or attend 3+ clinics	$\geq 60\%$ meet activity threshold		[NEW METRIC]

Volunteer Satisfaction

What This Measures: Average survey score ($\geq 80\%$ rating “satisfied” or “very satisfied”).

Implementation: *If data is not currently being collected, a requirement should be established to send surveys (or make calls) to volunteers after attending clinics or participating in cases, in order to measure process satisfaction, gather feedback, and begin tracking this metric.*

Additional: Follow up with volunteer lawyers, by board members, to gauge what was successful/satisfying and what areas/communication/documentation/mentoring need improvement.

Meets Expectations (3)	Exceeds Expectations (4-5)	Rating	Notes
$\geq 80\%$ satisfied/very satisfied	$\geq 85\%$ satisfied/very satisfied		

Volunteer/Team Member Engagement Initiatives

What This Measures: Coordinate with board and staff on number of team members or board-initiated volunteer touchpoints (e.g., thank-you calls, engagement events, happy hours).

Activities Include: - Personal thank you to firms - Provide logo or symbols for firms to add to their website (ED or other staff to determine) - Thank you to individuals volunteering at clinics, non-lawyers too, security, library staff - Coordinate with board and staff members to assist

Meets Expectations (3)	Exceeds Expectations (4-5)	Rating	Notes
≥3 engagement events/touchpoints annually	≥5 events + innovative engagement strategies		Coordinate with Board/staff

Volunteer Pain Point Resolution

What This Measures: Develop specific additional events or ways to engage volunteers. Bring to the Board ideas of how to enhance engagement and pain points of current volunteers.

Meets Expectations (3)	Exceeds Expectations (4-5)	Rating	Notes
Present findings to Board with 2+ improvement ideas	Implement improvements with measurable impact		[NEW METRIC]

Non-Attorney Volunteer Recognition

What This Measures: Recognition of all volunteer types including security, library staff, and clinic support volunteers.

Meets Expectations (3)	Exceeds Expectations (4-5)	Rating	Notes
Acknowledge security, library, clinic support staff	Formalized recognition program implemented		[NEW METRIC]

Overall Volunteer Engagement Rating: _____ / 5

Evaluator Comments:

6. COMMUNITY ENGAGEMENT & ADVOCACY

Objective: Strengthen relationships and amplify the organization's mission.

Google Reviews

What This Measures: Current rating: 3.8 and 50 Reviews. *Add a QR Code to clinic forms and represented clients exit interview asking for a google review.*

Meets Expectations (3)	Exceeds Expectations (4-5)	Rating	Notes
Improve from 3.8 to ≥ 4.2 ; reach 75 reviews	≥ 4.5 rating; 100+ reviews		[TARGETS ADDED]

Community Partnerships

What This Measures: Number of events hosted or co-hosted with current/new partners (e.g., AYL, CAPA, State Bar, CATLA), including tabling and other partnership initiatives.

Meets Expectations (3)	Exceeds Expectations (4-5)	Rating	Notes
Host/co-host ≥ 4 events with partners	≥ 6 events with measurable outcomes		Track attendance and engagement

Community Outreach

What This Measures: Number of community events, clinics, and CLEs conducted per year.

Meets Expectations (3)	Exceeds Expectations (4-5)	Rating	Notes
Conduct ≥ 8 events/clinics/CLEs annually	≥ 12 events with documented reach		

Media & Public Relations

What This Measures: Media mentions, news articles, interviews, and press releases to increase organizational visibility.

Meets Expectations (3)	Exceeds Expectations (4-5)	Rating	Notes
≥ 2 media mentions or articles per year	≥ 4 media mentions + proactive PR strategy		[NEW METRIC]

Advocacy & Policy Impact

What This Measures: Participation in advocacy initiatives including legislative testimony, coalition participation, and policy contributions.

Meets Expectations (3)	Exceeds Expectations (4-5)	Rating	Notes
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Participate in ≥ 2 advocacy initiatives	Lead advocacy effort with measurable impact	[NEW METRIC]
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Social Media Engagement

What This Measures: Consistent social media posting and follower growth to maintain modern outreach and engagement.

Meets Expectations (3)	Exceeds Expectations (4-5)	Rating	Notes
Consistent posting (2x/week); $\geq 5\%$ growth	$\geq 3x/week$; $\geq 10\%$ follower growth		[NEW METRIC]

Overall Community Engagement Rating: _____ / 5

Evaluator Comments:

7. BOARD ENGAGEMENT

Objective: Maintain strong, active governance support.

Board Committee Efficacy

What This Measures: Ensure each committee's meetings are well-attended, goals are clearly defined, and committee objectives are met.

Meets Expectations (3)	Exceeds Expectations (4-5)	Rating	Notes
All committees have clear goals; $\geq 75\%$ attendance	$\geq 85\%$ attendance + all goals achieved		

Board Communication - Updates

What This Measures: Timely updates on grants, funding deadlines, and key organizational issues.

Meets Expectations (3)	Exceeds Expectations (4-5)	Rating	Notes
Timely updates on grants, funding, key issues	Proactive communication + strategic insights		

Board Communication - Engagement

What This Measures: Engagement and communication with the board regarding assistance in meeting annual expectations.

Meets Expectations (3)	Exceeds Expectations (4-5)	Rating	Notes
Regular engagement with Board on expectations	Proactive outreach; anticipates Board needs		

Board Communication - Responsiveness/Receptiveness

What This Measures: Responsiveness to Board Communication. Operate from a position of YES and CAN DO - be responsive to board requests and affirmatively seek out solutions rather than providing excuses on why things cannot be done.

Meets Expectations (3)	Exceeds Expectations (4-5)	Rating	Notes
Respond within 48 hours; solution-oriented	Respond within 24 hours; proactively present solutions		[CLARIFIED] “Can do” approach

Board Meeting Materials

What This Measures: Board meeting materials sent with adequate preparation time before meetings.

Meets Expectations (3)	Exceeds Expectations (4-5)	Rating	Notes
Materials sent ≥ 3 days before meetings	Materials sent ≥ 5 days + executive summaries		[NEW METRIC]

Strategic Planning Participation

What This Measures: Active participation in strategic planning process and leading strategic initiatives.

Meets Expectations (3)	Exceeds Expectations (4-5)	Rating	Notes
Active participation in strategic planning process	Lead strategic initiatives with Board		[NEW METRIC]

Board Satisfaction

What This Measures: Annual board survey shows $\geq 85\%$ satisfaction with ED communication, responsiveness, and leadership.

Note: The expectation of board members is imposed by the president and executive committee, and he/she should be the one who introduces the packet regarding expectations of our own peers.

Meets Expectations (3)	Exceeds Expectations (4-5)	Rating	Notes
≥85% satisfied with ED performance	≥90% satisfied with ED performance		Conducted by Board President/Exec Committee

Overall Board Engagement Rating: _____ / 5

Evaluator Comments:

OVERALL PERFORMANCE SUMMARY

Performance Area	Rating (1-5)	Weight	Weighted Score
1. Mission Alignment		20%	
2. Financial Management		15%	
3. Fundraising & Development		20%	
4. Staff Management & Leadership		15%	
5. Volunteer Engagement		10%	
6. Community Engagement & Advocacy		10%	
7. Board Engagement & Governance		10%	
TOTAL OVERALL RATING		100%	_____ / 5

KEY STRENGTHS & ACCOMPLISHMENTS

List key achievements and areas of excellence:

AREAS FOR DEVELOPMENT

List specific areas needing improvement with actionable steps:

Are a	Specific Issue	Action Required	Timeline	Support Needed
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GOALS FOR NEXT EVALUATION PERIOD

EVALUATION PROCESS & TIMELINE

Next Steps:

1. **Finalize review metrics**
2. **Schedule a closed meeting prior to the December Board Meeting**
 - Katharine to send out an email to the board with a google poll (with multiple selections possible) on what dates would work best
 - Obtain feedback from the Board on:
 - General feedback
 - Specifically:
 - What Alisa is doing well
 - What areas she needs to improve upon
 - Specific examples
3. **Provide Alisa with this framework at the end of this year and let her know she will be held to these benchmarks next December.**

Signatures:

Executive Director: _____ **Date:** _____

Board President: _____ **Date:** _____

Executive Committee Chair: _____ **Date:** _____

NOTES ON NEW/ENHANCED CONTENT

[NEW METRIC] = Entirely new performance measure added to strengthen evaluation

[CLARIFIED] = Existing metric that has been clarified or expanded

[TARGETS ADDED] = Specific benchmarks added to previously vague criteria

Key Enhancements Include: - Service quality indicators for mission effectiveness - Financial reporting accuracy and audit performance metrics - Grant prospecting requirements for proactive development - Staff communication standards and succession planning measures - Volunteer activity depth tracking and pain point resolution - Media/PR, advocacy, and social media metrics for community engagement - Board meeting materials timeliness standards and strategic planning participation - Weighted scoring system for overall performance calculation

Tab 2

Employee Performance Review Evaluation Form with Ratings



This slide is 100% editable. Adapt it to your needs and capture your audience's attention.

Employee Details:		
Employee Name	Jackson May	Job Title Software Developer
Supervisor/Reviewer	Seth Mcdonald	Review Period From: XX/XX/XXXX To: XX/XX/XXXX
II. CORE VALUES		
PERFORMANCE CATEGORY	RATING	COMMENTS AND EXAMPLES
 Quality of Work: • Work is effectively and timely completed • Text Here	☒ Exceeds expectations ☐ Meets expectations ☐ Needs improvement ☐ Unacceptable	• Text Here • Text Here
 Attendance & Punctuality: • Notify beforehand regarding leaves • Text Here	☒ Exceeds expectations ☐ Meets expectations ☐ Needs improvement ☐ Unacceptable	• Text Here • Text Here
 Reliability/Dependability • Effective management of the time and workload to achieve targets • Text Here	☒ Exceeds expectations ☐ Meets expectations ☐ Needs improvement ☐ Unacceptable	• Text Here • Text Here
 Judgment & Decision-making: • Text Here • Text Here	☒ Exceeds expectations ☐ Meets expectations ☐ Needs improvement ☐ Unacceptable	• Text Here • Text Here
 Text Here	Text Here	Text Here

960 × 720