

**EAST CENTRAL BOCES
EXECUTIVE DIRECTOR
PERFORMANCE PLANNING AND EVALUATION FORM**

EVALUATION PERIOD: _____

TO _____

EXECUTIVE DIRECTOR
NAME

Please circle the phase that you are completing: PLANNING PROGRESS YEAR-END

The performance planning and evaluation system for Executive Director is a communication tool for the Executive Director and the Board. It is designed to promote better understanding about job responsibilities and performance expectations.

EVALUATION PROCESS

Planning Phase

At the beginning of the evaluation period, the Executive Director and the Board will meet to discuss and/or establish the core work competencies, major job responsibilities, and goals and the importance of each to the overall evaluation.

The Board shall complete the "Board Planning Comments" section, obtain proper signatures, and provide a copy for the Executive Director. If the Executive Director disagrees with the Performance Plan, he/she shall explain the disagreement in the "Executive Director Comments" section. The planning phase should be completed by the January regular Board meeting.

Progress Review Phase

At midyear, the Board and Executive Director shall meet to discuss the Executive Director's performance and to decide if the performance plan needs to be revised. The Board shall provide feedback to the Executive Director on the accomplishment of established job responsibilities and goals. The Board shall also complete the "Progress Review" section, obtain proper signatures, and provide a copy for the Executive Director. The progress review phase should be completed by the June regular Board meeting.

Year-End Evaluation

At the end of the evaluation period, the Board and Executive Director will meet to discuss overall performance ratings. The Board shall also complete the "Board Overall Justification for the Rating" section, obtain proper signatures, and provide a copy for the Executive Director. If any of the core work competencies, job duties, or goals are rated "Needs Improvement" the Board shall explain the reason for the rating in the comments section for that individual factor. If the Executive Director disagrees with the year-end evaluation rating, he/she shall explain the disagreement in the "Executive Director Comments" section. The annual evaluation should be completed in the month of January before the regular Board meeting.

The Board shall evaluate each core work competency, job duty, and goal using the following rating levels:

NEEDS IMPROVEMENT: Performance falls short of the standards established for the job. Work may be of variable quantity and quality or may be consistently short of the mark. Goals are not consistently achieved.

MEETS EXPECTATIONS: Performance satisfies the requirements of the job. Quality and quantity of work meet requirements of the job. Goals and expected results are achieved or slightly exceeded.

EXCEEDS EXPECTATIONS: Performance is commendable and quality of work is convincingly better than established standards or expectations. Goals and expected results are convincingly exceeded.

MERITORIOUS: Performance is outstanding. Performance consistently and significantly exceeds expectations of the job.

WORK COMPETENCY SECTION

FACTOR: PLANNING, ORGANIZING, AND COORDINATING – To what extent does the Executive Director develop goals, objectives, plans, and procedures; set priorities, schedules and deadlines to avert crises; maintain records, forms, and/or documents; prepare project costs estimates and justified budget requirements; coordinate with others to establish and implement plans; and maintain flexibility to meet changes?

☐ Needs Improvement ☐ Meets Expectations ☐ Exceeds Expectations ☐ Meritorious

FACTOR: INTERPERSONAL RELATIONS AND COMMUNICATIONS – To what extent does the Executive Director maintain smooth working relations, support, and respect of others; demonstrate tact and diplomacy in negotiations or confrontations with others; contribute to maintaining the level of employee morale and motivation; recognize work well-done by others; gain cooperation from others when necessary; maintain accessibility to others and responds to their questions, needs and concerns; seek and consider ideas from others on issues that affects them; prepare written documents which are complete, clear and understandable; communicate to provide or exchange information; keep others informed; perform as a team player?

☐ Needs Improvement ☐ Meets Expectations ☐ Exceeds Expectations ☐ Meritorious

FACTOR: PROBLEM ANALYSIS AND DECISION MAKING – To what extent does the Executive Director identify and define potential and real problems; obtain facts before making decisions; seek input from others when appropriate; consider and/or generate options to solve problems; assure decisions are made at, or referred to, appropriate level?

☐ Needs Improvement ☐ Meets Expectations ☐ Exceeds Expectations ☐ Meritorious

FACTOR: ORGANIZATIONAL COMMITMENT AND ADAPTABILITY/PROFESSIONAL CONTRIBUTIONS AND ACCOMPLISHMENTS – To what extent does the Executive Director possess knowledge of established policies and procedures and apply them consistently; convey a positive and professional image of ECBOCES to others; put forth effort when the need arises to better serve students or others; exhibit receptiveness to suggestions/ideas from others; modify or adapt plans and programs as needed? In addition, please list any professional contributions and accomplishments below. To what extent is the employee involved in ECBOCES quality improvement efforts?

☐ Needs Improvement ☐ Meets Expectations ☐ Exceeds Expectations ☐ Meritorious

FACTOR: SUPERVISION/MANAGEMENT – To what extent does the Executive Director maintain a level of service in all areas; meet schedules and deadlines for completion of work; develop methods and procedures for employees to complete work; conduct adequate inspections for quality control and work completion; provide supervision, feedback and training for employees; utilize employee's skills and abilities; conduct performance planning and appraisals for employees according to schedule and procedures; develop goals, objectives and deadlines and communicate them to employees; resolve routine personnel issues or problems; supervise employees to demonstrate productivity, competence, and high morale?

☐ Needs Improvement ☐ Meets Expectations ☐ Exceeds Expectations ☐ Meritorious

JOB DUTIES SECTION

Major Job Duty #1:

☐ Needs Improvement☐ Meets Expectations☐ Exceeds Expectations☐ Meritorious

Major Job Duty #2:

☐ Needs Improvement☐ Meets Expectations☐ Exceeds Expectations☐ Meritorious

Major Job Duty #3:

☐ Needs Improvement☐ Meets Expectations☐ Exceeds Expectations☐ Meritorious

Major Job Duty #4:

☐ Needs Improvement☐ Meets Expectations☐ Exceeds Expectations☐ Meritorious

Major Job Duty #5:

☐ Needs Improvement☐ Meets Expectations☐ Exceeds Expectations☐ Meritorious

GOAL SECTION

File: CBI-E

Goal #1:



Needs Improvement



Meets Expectations



Exceeds Expectations



Meritorious

Goal #2:



Needs Improvement



Meets Expectations



Exceeds Expectations



Meritorious

Goal #3:



Needs Improvement



Meets Expectations



Exceeds Expectations



Meritorious

Board Planning Comments (Mandatory):

Executive Director Signature

Date

EC BOCES Board President Signature

Date

Board Progress Review Comments (Mandatory):

Executive Director Signature

Date

EC BOCES Board President Signature

Date

OVERALL EVALUATION RATING

☐ Needs Improvement ☐ Meets Expectations ☐ Exceeds Expectations ☐ Meritorious

**Board Overall Evaluation Justification for the Rating
(Mandatory).**

Executive Director
Signature

D
a
t
e

EC BOCES Board President
Signature

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**Comments from Executive
Director (Optional):**

