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Executive Director Performance Evaluation Form

Overview

As with any other employee evaluation, Executive Director evaluations should focus on both what the ED has achieved as well as how the ED operates. This sample evaluation form will help you do that.

The Executive Director Performance Evaluation Form consists of three parts:

1. **The “what”:** To what extent is the ED leading the organization to accomplish what it should be accomplishing? Is the ED leading the organization to deliver results in the short- and longer-term?
2. **The “how”:** To what extent is how the ED is leading consistent with our values, and our beliefs about what skills the ED needs in order to be effective?
3. **The “what next”:** Moving forward, what are the implications of this review in terms of ED tenure, areas in which the ED should continue performing well, and areas in which the ED should improve?

Part I: What was achieved?

The board and ED should agree at the start of the year on the most important goals for the organization. The first section of the review focuses on the extent to which the organization achieved those goals. (In cases where unforeseen opportunities or challenges arose during the year that were not captured in the initial goals, they should be added here as well.)

Part II: How was it achieved?

This section focuses on values that all employees are expected to demonstrate, which the ED should model, as well as competencies and behaviors that are key to the ED position in particular.

Part III: Summary and Next Steps

This section summarizes performance for the year and identifies overall areas of strength, areas for improvement, and next steps.

The ED should fill this form out as a self-assessment, and then the board will use this form to complete the final evaluation, taking into account relevant data on the organization’s progress toward goals, as well as input from the staff¹, fellow board members, and the ED’s self-evaluation.

Ratings

The following scale is used for all ratings in the review:

- **Exceeds expectations:** Consistently delivers exceptional results; is a model for others to follow.
- **Meets expectations:** Consistently meets expectations in all areas.
- **Partially meets expectations:** Meets expectations in some areas and needs improvement in others.
- **Does not meet expectations:** Needs significant improvement quickly.

¹ Often boards conduct surveys of staff, board members, and/or external constituents as part of the evaluation process. If you choose to do a survey, use that data as important input to inform the evaluation, but do not substitute a survey for the evaluation itself.

Timeline

Activity	Date	Notes
ED drafts and submits self-evaluation, using attached form		
Evaluation Committee solicits input from relevant stakeholders, via survey, confidential conversations, or other means		
Evaluation Committee ² considers inputs, reviews goals and results achieved, and drafts evaluation		
Evaluation Committee sends draft evaluation to ED		
ED and Evaluation Committee meet to discuss evaluation		
Evaluation Committee makes any changes and submits evaluation to full board		
Evaluation Committee discusses conclusions with board, which votes to approve (or, in rare cases, modify) and discusses any relevant next steps		

Executive Director Performance Evaluation Form

Executive Director Name			
Review Period		Review Date	

² Rather than using a separate Evaluation Committee, the board may instead wish to have the board chair and vice chair, or board Executive Committee, serve this role.

Reviewed by	___ Self ___ Board
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1. Organizational Goals		
Goal ³ <i>Note: Put each goal in a separate row, adding more rows as needed. If you'd like, you can mark the most important goals in bold.</i>	Result	Rating E: exceeds expectations M: meets expectations P: partially meets expectations D: Does not meet expectations

Comments (optional): To what extent did you/the Executive Director achieve the goals for the position this past period?

2. Demonstrating Performance Factors
<i>To what degree did you / the Executive Director demonstrate the following core values and competencies?</i>

Core Values <i>Add more rows as needed</i>	Description of Value	Rating (E, M, P, D, N/A)

Core Competencies <i>Add more rows as needed</i>	Description of Competency	Rating (E, M, P, D, N/A)

³ List the most important objectives for the organization for the period covered by the evaluation, and assess the extent to which the ED led the organization to meet those objectives.

Comments (optional): In what priority areas of performance (values and competencies) did you / the Executive Director excel? In what areas is improvement needed?

3. Summary Assessment, Next Steps, and Trajectory at Organization

Overall performance rating:

☐ Exceeds Expectations
☐ Partially Meets Expectations

☐ Meets Expectations
☐ Does Not Meet Expectations

Comments (Note: if you—the board—conducted 360 feedback or solicited input from others, use this section to summarize themes and highlights in addition to your own assessment.)

1. What are 1-3 notable areas of strength?

a.
b.

2. What are 1-3 areas of growth or improvement?

a.
b.

3. What do you see as your / the Executive Director's trajectory in the organization? What are the next steps?

4. Feedback for Board / Board Self-Reflection

**What has the board done well or effectively to provide support to the Executive Director?
What might the board have done differently?
What support is needed from the board moving forward?**