Executive Director Performance Evaluation Form

|  |
| --- |
| About this Resource **This evaluation template is intended for use by both the Evaluation Committee[[1]](#footnote-1) and the director.** 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 staff,[[2]](#footnote-2) partners and key stakeholders, and the ED’s self-evaluation.  To get the most use out of this tool, you should add or remove sections as you see fit. Insert all of the goals, team or organizational values, and core competencies that you expect from the executive director. You may also outline the timeline for your process (including key deadlines) below. |

Before you get started, review our [Frequently Asked Questions—and Answers—About Performance Evaluations](https://www.managementcenter.org/article/frequently-asked-questions-answers-performance-evaluations/). A few other things to keep in mind:

* **Effective leaders create the conditions for getting things done sustainably and equitably:** For executive directors, principals, co-directors, and CEOs, this means meeting ambitious and strategic annual goals, laying the groundwork for the future, and leading in a way that’s consistent with organizational values. As with other employee evaluations, ED evaluations should focus on both what the ED has accomplished (results) as well as how the director, CEO, principal, or co-director operates (values and approach).
* **Preparation:** During the evaluation process, both the board and the executive director take time to reflect before meeting. Evaluators may review ED work products, role expectations, and the results they achieved, in addition to gathering input from staff members and key partners.
* **Summarize, without surprise:** The board and executive director should agree at the start of the year on the most important strategic goals for the organization. The evaluation should reflect and build on progress reports and discussion throughout the year. While the performance review is not usually the time for surprise findings, this will depend on the degree of board engagement with staff and stakeholders during the year.
* **Broaden your perspective**: Ask staff, partners, and key stakeholders for input. [Seeking input](https://www.managementcenter.org/article/how-to-gather-and-use-input-from-others-in-performance-evaluations/) can bring rigor, help [offset individual bias](https://www.managementcenter.org/article/four-ways-to-mitigate-bias-in-performance-evaluations/), and help boards identify patterns or inconsistencies, especially across lines of difference or power.

# ED Performance Evaluation Overview

The Executive Director Performance Evaluation Form consists of four parts:

1. **What was achieved?**To what extent is the executive director leading the organization to accomplish its goals? Is the ED leading the organization to deliver results in the short- and longer-term? 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, they should be added here as well.)
2. **How was it achieved?**To what extent is the executive director leading in a way that is consistent with our values and our beliefs about the approaches necessary for effective performance in the lead role? 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.
3. **What’s next?**Moving forward, what are the implications of this review in terms of executive director tenure? Which areas should the ED continue performing well, and which areas should the ED improve? This section summarizes annual performance and identifies areas of strength, improvement, and next steps.
4. **Feedback for board and board self-reflection**What did the board do well to support ED success? What is needed? This section gives both the board and the director space to reflect on what’s working and what support is needed moving forward.

## Ratings

* **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.

|  |  |  |
| --- | --- | --- |
| **Timeline** | | |
| **Activity** | **Date** | **Notes** |
| ED drafts and submits self-evaluation, using form below |  |  |
| Evaluation Committee solicits input from stakeholders, via survey, confidential conversations, or other means |  |  |
| Evaluation Committee 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 changes (if needed) and submits evaluation to full board |  |  |
| Board discusses conclusions, votes to approve (or, in rare cases, modify), and confirms next steps |  |  |

Executive Director Performance Evaluation Form

|  |  |  |  |
| --- | --- | --- | --- |
| **Executive Director Name** |  | | |
| **Review Period** |  | **Review Date** |  |
| **Reviewed by** | **⬚** Self **⬚** Board | | |

|  |  |  |
| --- | --- | --- |
| **1. Organizational Goals** | | |
| **Goal[[3]](#footnote-3)**  *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.* | **Result** | **Rating**  **E: *exceeds expectations***  **M: *meets expectations***  **P: *partially meets expectations***  **D: *Does not meet expectations*** |
|  |  |  |
|  |  |  |
|  |  |  |
| **Executive Director comments:** *To what extent did you achieve the goals for the position this past period?* | | |
| **Evaluator comments:** *To what extent did the executive director achieve the goals for the position this past period?* | | |

|  |  |  |
| --- | --- | --- |
| **2. Demonstrating Performance Factors** | | |
| **Core Values**  *Add more rows as needed* | **Description of Value** | **Rating**  **(E, M, P, D, N/A)** |
|  |  |  |
|  |  |  |
|  |  |  |

|  |  |  |
| --- | --- | --- |
| **Core Competencies**  *Add more rows as needed* | **Description of Competency** | **Rating**  **(E, M, P, D, N/A)** |
|  |  |  |
|  |  |  |
|  |  |  |

|  |
| --- |
| **Executive Director comments:** *To what degree did you demonstrate the above core values and competencies? In what values and competencies did you excel? In what areas is improvement needed?* |
| **Evaluator comments:** *To what degree did they demonstrate the above core values and competencies? In what values and competencies did they excel? In what areas is improvement needed?* |

|  |
| --- |
| **3. Summary Assessment, Next Steps, and Trajectory at Organization** |
| **Overall performance rating:**  **⬚** Exceeds Expectations **⬚** Meets Expectations  **⬚** Partially Meets Expectations **⬚** Does Not Meet Expectations |
| **Executive Director self-assessment of performance:**    1. What are 1-3 notable areas of strength?  2. What are 1-3 areas of growth or improvement?  3. What do you see as your trajectory in the organization? What are the next steps? |
| **Evaluator assessment of ED performance:[[4]](#footnote-4)**  1. What are 1-3 notable areas of strength?  2. What are 1-3 areas of growth or improvement?  3. What do you see as the ED’s trajectory in the organization? What are the next steps? |

|  |
| --- |
| **4. Feedback for Board / Board Self-Reflection** |
| **Executive Director comments:**   * What has the board done well or effectively to support you in your role as director? * What might the board have done differently? * What support do you need from the board moving forward? |
| **Board Self-Reflection:**   * What has the board done well or effectively to support the director? * What might the board have done differently? * What support is needed from the board moving forward? |

1. Rather than forming a separate Evaluation Committee, the board may elect to have the board chair and vice chair, or board Executive Committee, conduct the evaluation. [↑](#footnote-ref-1)
2. 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. [↑](#footnote-ref-2)
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. [↑](#footnote-ref-3)
4. If the board or committee solicited input from others, use this section to summarize themes and highlights in addition to your own assessment. [↑](#footnote-ref-4)