



Executive Director Evaluation

Name:

Date:

DIRECTIONS:

Begin by reviewing the Executive Director’s achievements against the written goals from his or her annual workplan, which the Board and Executive Director agreed to. If such a work plan doesn’t exist, make sure you use *this* evaluation cycle to create one for the coming year. The following form lists qualities and performance which are generally required of executive directors. Please circle the appropriate response describing the Executive Director's level of performance according to the following scale:

- 1 = Excellent**
- 2 = Good**
- 3 = Adequate**
- 4 = Needs Improvement**
- 5 = Unacceptable**
- DK = Don't Know** (*no basis for making a judgment*)

In the comment section, please give examples and/or reasons for rankings when you think that would help explain your evaluation.

Evaluation Topics

1) OVERALL PERFORMANCE

Helping to provide a sense of direction for the organization:	1	2	3	4	5	DK
Taking overall responsibility for the organization’s well-being:	1	2	3	4	5	DK
Providing program leadership:	1	2	3	4	5	DK
Providing leadership for staff:	1	2	3	4	5	DK
Providing fundraising leadership:	1	2	3	4	5	DK

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2) FUNDRAISING

Knowledge of foundations:	1	2	3	4	5	DK
Development of new foundation sources:	1	2	3	4	5	DK
Rapport/relationships established with foundation people:	1	2	3	4	5	DK
Knowledge of patrons:	1	2	3	4	5	DK
Development of new patrons:	1	2	3	4	5	DK
Rapport/relationships established with patrons:	1	2	3	4	5	DK
Adequacy of fundraising strategy:	1	2	3	4	5	DK
Adequacy of strategy implementation:	1	2	3	4	5	DK
Achievement of fundraising goals:	1	2	3	4	5	DK
Ability to motivate funders to help us in the funding world:	1	2	3	4	5	DK
Involvement of Board and Staff:	1	2	3	4	5	DK

3) PUBLIC RELATIONS

Executive Director's image outside Board and Staff:	1	2	3	4	5	DK
Adequacy of national networking:	1	2	3	4	5	DK
Rapport/relationships established with clients in all constituencies:	1	2	3	4	5	DK
Image with its desired audiences:	1	2	3	4	5	DK

4) ADMINISTRATION

Keeping all areas of work – program, fundraising and administration – on track and in balance:	1	2	3	4	5	DK
Identifying organization weakness and needs and developing strategies to address them:	1	2	3	4	5	DK
Developing clear, thoughtful and functional organizational policies:	1	2	3	4	5	DK

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5) PROGRAM PLANNING & IMPLEMENTATION

Quality of project ideas:	1	2	3	4	5	DK
Operating Plan development and clarity:	1	2	3	4	5	DK
Adherence to plan during the year:	1	2	3	4	5	DK
Monitoring and evaluation of progress:	1	2	3	4	5	DK
Quality of organization's work:	1	2	3	4	5	DK
Number and nature of organizational accomplishments:	1	2	3	4	5	DK
Development of internal planning and monitoring systems:	1	2	3	4	5	DK

6) PROGRAM ACTIVITIES & CONSULTING

Effectiveness of work with client groups:	1	2	3	4	5	DK
Effectiveness in assessing client needs:	1	2	3	4	5	DK
Extent of participation in all programs:	1	2	3	4	5	DK

7) BOARD OF DIRECTORS

Communication with Board:	1	2	3	4	5	DK
Motivation of Board:	1	2	3	4	5	DK
Seeking and abiding by Board decisions:	1	2	3	4	5	DK
Responsiveness to Board requests:	1	2	3	4	5	DK
Use of Board skills:	1	2	3	4	5	DK
Assistance in Board development:	1	2	3	4	5	DK

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8) STAFFING

Quality of Staff:	1	2	3	4	5	DK
Adequacy of Staff compensation (all forms):	1	2	3	4	5	DK
Motivation of Staff:	1	2	3	4	5	DK
Success in getting Staff to work together effectively:	1	2	3	4	5	DK
Encouragement of personal and professional development:	1	2	3	4	5	DK
Adequacy of Staff job descriptions and evaluation:	1	2	3	4	5	DK
Appropriate definition of Staff functions and positions:	1	2	3	4	5	DK
Adequacy and appropriateness of supervision of Staff:	1	2	3	4	5	DK
Appropriateness of response to feedback from Staff:	1	2	3	4	5	DK

9) FINANCIAL MANAGEMENT

Adequacy of financial records:	1	2	3	4	5	DK
Adherence to budget:	1	2	3	4	5	DK
Wisdom of spending and asset management choices:	1	2	3	4	5	DK
Adequacy of reporting to Staff and Board:	1	2	3	4	5	DK
Compliance with government requirements:	1	2	3	4	5	DK

10) INDIVIDUAL SKILLS AND PRACTICES

Work hours and habits, use of time:	1	2	3	4	5	DK
Writing ability:	1	2	3	4	5	DK
Professional development activities:	1	2	3	4	5	DK
Speaking ability:	1	2	3	4	5	DK
Adequacy of compensation (all forms):	1	2	3	4	5	DK
Personal style and impression:	1	2	3	4	5	DK
Accomplishment of professional and career goals:	1	2	3	4	5	DK
Use of Staff and Board members to complement skills:	1	2	3	4	5	DK

