



Executive Director Performance Evaluation and Development Plan Self-Evaluation Summary

<p><u>Purpose:</u></p> <p>The purpose of this process is to provide feedback on Executive Director performance, enhance individual performance and development and provide rationale for a merit increase.</p>	<p><u>Mission Statement of Your Organization:</u></p> <p>Our mission is to provide interim executive leadership and consulting services to nonprofit organizations in transition.</p>
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Employee Name:	Current Date: ___ / ___ / ___	Hire Date: ___ / ___ / ___	
Performance period: From: ___ / ___ / ___ to ___ / ___ / ___	Check one:	<input type="checkbox"/> Quarterly	<input type="checkbox"/> Annual
		<input type="checkbox"/> Special	

<p><u>Evaluation Definitions</u></p> <p>Demonstrates Exceptional Performance: Performance is exemplary-“best of the best”. Performs at the highest level of capability. ED contributes and leads innovative workable solutions to projects/problems. Exhibits leadership behavior which enhances group performance.</p> <p>Exceeds Expectations: ED is an excellent performer. Embraces work assignments and produces high quality work. Takes initiative to perform functions above and beyond the scope of his/her responsibilities.</p> <p>Achieves Expectations: ED is a solid performer and fully competent. Adjusts effectively to changing expectations and assignments. Produces results dependably, timely and accurately.</p> <p>Demonstrates Progress Towards Expectations: ED has made improvement towards performance expectations and objectives. Shows continued effort in learning new skills and knowledge to achieve performance objectives.</p> <p>Does Not Achieve Minimum Expectations: ED doesn’t achieve minimum performance expectations and objectives; work performance is clearly not acceptable.</p>
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Performance Expectations	Self-Evaluation	Board Evaluation
<p>1. Leadership –</p> <ul style="list-style-type: none"> Inspire team work toward common objectives Take calculated risks Live the core values Provide inspirational leadership and direction to the leadership team <p>Goal: Keep the Leadership Team intact - - no voluntary turnover . . . no one leaves because they are unhappy with their job. Keep overall employee voluntary turnover from exceeding 10% annually.</p>	<p><i>11/20XX: On track. There were no voluntary turnovers among the Leadership Team. Overall employee voluntary turnover since Aug 1, 20XX is 2.5%.</i></p>	<ul style="list-style-type: none"> <input type="checkbox"/> Demonstrates Exceptional Performance <input type="checkbox"/> Exceeds Expectations <input type="checkbox"/> Achieves Expectations <input type="checkbox"/> Demonstrates Progress Towards Expectations <input type="checkbox"/> Does not Achieve Minimum Expectations
Performance Expectations	Self-Evaluation	Board Evaluation
<p>2. Communications –</p> <ul style="list-style-type: none"> Communicate with Board Communicate with member clients Communicate with leadership team & staff <p>Goal: Sustain high communications with the Board, staff and clients. No complaints surface to the Chairman or to the Performance & Compensation Committee regarding poor communications.</p>	<p><i>11/20XX: On track. No complaints received. High communications with the Board and leadership team remains a high, high priority through monthly Board e-mail updates, regular one-on-one sit-downs with the leadership team, monthly all-staff meetings and email blasts to member clients. I talk with the Chairman weekly and most times 2-3 times/week.</i></p>	<ul style="list-style-type: none"> <input type="checkbox"/> Demonstrates Exceptional Performance <input type="checkbox"/> Exceeds Expectations <input type="checkbox"/> Achieves Expectations <input type="checkbox"/> Demonstrates Progress Towards Expectations <input type="checkbox"/> Does not Achieve Minimum Expectations
<p>Additional Comments:</p>		

Performance Expectations	Self-Evaluation	Board Evaluation
<p>3. Program Delivery –</p> <ul style="list-style-type: none"> • Formulate, refine and develop programs, products and services that are efficient and responsive to market needs • Establish service level goals and monitor system performance in meeting those goals • Maintain an environment of continuous improvement in delivering programs <p>Goal: Initiate and implement IT system upgrades to the delivery processes in 30% of the established programs (100% to be completed in 3-4 years).</p>	<p><i>11/20XX: Upgrades to the membership join/renewal process have been implemented on the website.</i></p>	<ul style="list-style-type: none"> <input type="checkbox"/> Demonstrates Exceptional Performance <input type="checkbox"/> Exceeds Expectations <input type="checkbox"/> Achieves Expectations <input type="checkbox"/> Demonstrates Progress Towards Expectations <input type="checkbox"/> Does not Achieve Minimum Expectations
Performance Expectations	Self-Evaluation	Board Evaluation
<p>4. Strategic Direction -</p> <ul style="list-style-type: none"> • Develop long term strategies and plans in support of mission and vision • Track performance against strategic plan • Update strategic plan annually <p>Goal: 85-100% of the strategic plan annual action steps will be successfully completed on-time, on target and within budget.</p>	<p><i>11/20XX: On track. The plan includes five organizational priority issues and goals supported by 16 action steps to be completed by July 31, 20XX. To date we have accomplished ¼ of these actions steps and on target to complete the remaining.</i></p>	<ul style="list-style-type: none"> <input type="checkbox"/> Demonstrates Exceptional Performance <input type="checkbox"/> Exceeds Expectations <input type="checkbox"/> Achieves Expectations <input type="checkbox"/> Demonstrates Progress Towards Expectations <input type="checkbox"/> Does not Achieve Minimum Expectations
<p>Additional Comments:</p>		

Performance Expectations	Self-Evaluation	Board Evaluation
<p>5. Resource Development & Fundraising-</p> <ul style="list-style-type: none"> • Develop diverse & sustainable funding strategy • Formulate & execute a comprehensive marketing branding <p>Goal: Increase bottom-line funding by 2-5% from previous year from major donors, foundations, government agencies and corporations.</p>	<p><i>11/20XX: On target. Bottom-line funding at this point in time is ahead of previous years by 2.5%.</i></p>	<ul style="list-style-type: none"> <input type="checkbox"/> Demonstrates Exceptional Performance <input type="checkbox"/> Exceeds Expectations <input type="checkbox"/> Achieves Expectations <input type="checkbox"/> Demonstrates Progress Towards Expectations <input type="checkbox"/> Does not Achieve Minimum Expectations
Performance Expectations	Self-Evaluation	Board Evaluation
<p>6. Employee Relations –</p> <ul style="list-style-type: none"> • Maintain a happy and productive work environment • Create an organizational culture driven by the core values • Grow and develop the leadership team <p>Goal: Develop a "one team" work environment that develops a more cohesive relationship among staff. Measure success, satisfaction and progress by annual feedback (survey) and strive for a 90-100% overall satisfaction rating.</p>	<p><i>11/20XX: Survey was conducted in September with an overall employee satisfaction rating of 72%. Work needs to be done to better align core values in support of a happy and productive work environment. Task force of employees formed to make recommendations for improvement to the leadership team.</i></p>	<ul style="list-style-type: none"> <input type="checkbox"/> Demonstrates Exceptional Performance <input type="checkbox"/> Exceeds Expectations <input type="checkbox"/> Achieves Expectations <input type="checkbox"/> Demonstrates Progress Towards Expectations <input type="checkbox"/> Does not Achieve Minimum Expectations
<p>Additional Comments:</p>		

Performance Expectations	Self-Evaluation	Board Evaluation
<p>7. Fiscal Responsibility/Accountability -</p> <ul style="list-style-type: none"> • Meet or exceed budget expectations • Provide accurate monthly financial reporting <p>Goal: Beat the budget - - end fiscal year with a net positive cash flow.</p>	<p><i>11/20XX: Organization is currently operating at \$33,000 ahead of budget.</i></p>	<ul style="list-style-type: none"> <input type="checkbox"/> Demonstrates Exceptional Performance <input type="checkbox"/> Exceeds Expectations <input type="checkbox"/> Achieves Expectations <input type="checkbox"/> Demonstrates Progress Towards Expectations <input type="checkbox"/> Does not Achieve Minimum Expectations
Performance Expectations	Self-Evaluation	Board Evaluation
<p>8. Interpersonal Skills –</p> <ul style="list-style-type: none"> • Work effectively and collaboratively as a member of the leadership team • Teach others, listen, serve, lead/follow and negotiate • Work well with people from diverse backgrounds <p>Goal: Be a team player in all dealings with the Board, leadership team and staff. No complaints surface to the Chairman or to the Performance & Compensation Committee regarding poor interpersonal skills.</p>	<p><i>11/20XX: On track. No complaints have been brought to my attention.</i></p>	<ul style="list-style-type: none"> <input type="checkbox"/> Demonstrates Exceptional Performance <input type="checkbox"/> Exceeds Expectations <input type="checkbox"/> Achieves Expectations <input type="checkbox"/> Demonstrates Progress Towards Expectations <input type="checkbox"/> Does not Achieve Minimum Expectations
<p>Additional Comments:</p>		

Performance Expectations	Self-Evaluation	Board Evaluation
<p>9. Community Relations –</p> <ul style="list-style-type: none"> Maintain a visible presence in the community in support of the organizational mission Foster alliances and partnerships with other nonprofit agencies and community leaders to increase the efficiency of our services and impact of our visibility <p>Goal: Be an active member of at least one community service organization that aligns with and supports our mission.</p>	<p><i>11/20XX: Ongoing member of the downtown Rotary Club.</i></p>	<ul style="list-style-type: none"> <input type="checkbox"/> Demonstrates Exceptional Performance <input type="checkbox"/> Exceeds Expectations <input type="checkbox"/> Achieves Expectations <input type="checkbox"/> Demonstrates Progress Towards Expectations <input type="checkbox"/> Does not Achieve Minimum Expectations
Performance Expectations	Self-Evaluation	Board Evaluation
<p>10. Professional Development –</p> <ul style="list-style-type: none"> Be aware of current trends, issues and events impacting the nonprofit environment and association management operations <p>Goal: Annually attend at least one professional development training activity, event, conference, etc.</p>	<p><i>11/20XX: Attended an American Society of Association Executives "Symposium for Chief Elected Officers and Chief Executive Officers" in XX/20XX.</i></p>	<ul style="list-style-type: none"> <input type="checkbox"/> Demonstrates Exceptional Performance <input type="checkbox"/> Exceeds Expectations <input type="checkbox"/> Achieves Expectations <input type="checkbox"/> Demonstrates Progress Towards Expectations <input type="checkbox"/> Does not Achieve Minimum Expectations
<p>Additional Comments:</p>		

Committee Comments:

Overall Evaluation:

Merit Salary Increase _____%

- Demonstrates Exceptional Performance
- Exceeds Expectations
- Achieves Expectations
- Demonstrates Progress Towards Expectations
- Does not Achieve Minimum Expectations

Acknowledgement & Signatures:

Executive Director Name

Date

Chair, Board Committee

Date

Chair, Board of Directors

Date

