

Evaluating the Performance of Nonprofit Executive Directors

Performance evaluation of nonprofit executive directors is an aspect of the Board's job that is often neglected. Below is an outline of the goals for that process, and how the process might take place.

Goals for Performance Evaluation

- Provide an opportunity for people in the organization to reflect on the performance of the executive director (ED) and on the organization's goals for that position.
- Hear how the ED is experiencing their job, how they feel about their performance, what their concerns are about their own performance and how they are being supported in the organization.
- Make sure the ED has the experience of feeling like their experience and concerns have been heard and understood.
- Provide clear and detailed feedback to the ED about what they are doing well and where there may be concerns.
- Review the job description and work plan for the ED and initiate the process of making changes for the coming year.
- Document the ED's performance (as a basis for references later, or for disciplinary action or firing if that is necessary). NOTE: If there are major performance issues, these should not come as a surprise to the ED in this evaluation – feedback about problems should happen as they arise, and be well documented as they happen.
- In some instances goals may also include: moving a new ED from probationary to regular status (document this), establishing the basis for pay increases (or lack thereof), bringing closure for both the ED and the organization when an ED leaves (exit interview).

Performance Evaluation Process for an Executive Director

- Identify a committee of board members that will do the evaluation. Assign one person to chair the group and run the process.
- Define the process – is this the coming out of the probation period review, an annual review, a special review because there are problems to be addressed or an exit interview?
- Review the job description and work plan the ED is using¹.
- Create a set of questions the performance review should answer.

¹ It is very important that the ED have a current job description (not just whatever was used for the hiring) and work plan that is updated every year and that is a set of expectations for the ED's work, not for the organization as a whole.

- Design a self-evaluation form for the executive director to fill out (may be different questions for different types of review), and send it to them. Give them a date by which to fill it out, and a clear sense of how detailed you expect the responses to be.
- Decide what mechanisms you will use to protect confidentiality when you are asking people (staff, board members, stakeholders/partners) for their honest feedback on the executive director's performance. (What mechanisms will be necessary, and possible, will depend on the size of the organization, the budget for doing the evaluation, and the needs of those involved.)
- Create a questionnaire for the board to fill out about the ED's performance (see below). Send it to them with a deadline for response. (In some cases it is useful for the board to see the ED's self-evaluation before filling out this questionnaire.)
- Create a questionnaire for other staff to fill out, or a set of questions the chair of the board committee will ask them by phone or in person (see below). Set those interviews or a deadline for the written response. Make clear that this is required.
- If feedback from community partners or other stakeholders is desired, decide on the questions, create a list of who to ask, send them the form with a deadline or set up interviews.
- Collect all the info from other people and the ED's self-evaluation. If there is a lot of input, or if needed for confidentiality, hire or assign someone to summarize it in writing for the committee. Discuss it in a meeting with the members of the committee before meeting with the ED. Decide how you feel about the person's performance, what feedback you want to give, how to handle any concerns you have.
- Meet with the ED (see page 4).
- Write up an evaluation. Give a copy to the ED to review. Give them an opportunity to state any concerns they have about it. Make revisions if appropriate.
- File the final version, along with the ED's self-evaluation, in the personnel files (one copy to board chair). (This assumes there are no major problems that need to be addressed.)
- Work with the ED to create a work plan for the coming year.
- Report to the Board that the evaluation has been done, and any salient information that arose in that process that the whole board needs to know. (It is sometimes useful and appropriate to share the written ED evaluation with the whole board, but it is a confidential document and must not be shared outside the board.)
- If a pay raise or movement from probationary status to permanent status is called for, have the full board act on the committee's recommendation at the next board meeting and file that information with the evaluation.
- The Board should also be integrating the work being doing on the ED's work plan with revisions to the larger strategic plan for the organization.

Self Evaluation Form

Text for a self-evaluation form might include the following. (Additional questions may be added for various kinds of evaluations – i.e. exit interviews.)

Please write up answers to the following questions and deliver to _____, chair of the Personnel Committee, by _____. On receipt, the Personnel Committee will schedule a meeting for a performance evaluation meeting.

- **Overview:** Please summarize your performance over the past X months, highlighting accomplishments, disappointments, changes in your work responsibilities, any general feelings about your role at (organization), etc. If you had established goals, how close have you come to meeting them? How does your present role at (organization) compare to what you expected when you joined (organization)? What factors/dynamics outside your control contributed to the successes and failures of this period?
- **What Lights You Up?** What parts of the work you are doing here are most exciting or satisfying for you? What is exciting/satisfying about those things? What parts of your job are the least interesting or most difficult for you to want to focus on?
- **Strengths:** Describe your principal assets as (organization's) Executive Director, and how your capabilities have evolved since you started work at this position.
- **Areas for Improvement:** List the skills you would like to improve, including any suggestions you may have on how (organization) can help you increase these skills. List anything else you'd like to change that would improve your performance (could include your work schedule, systems inside the organization, etc.).
- **Plans & Objectives for Next Year:** Be as specific as possible about goals you want to set for next year, for the organization, and for yourself in the organization.
- **Success Factors:** What will you focus on to help meet those goals successfully? What factors/dynamics outside your control will likely impact how well the organization will do in meeting these goals?
- **Feedback to the (organization) Board:** How can the Board (or Personnel Committee) do a better job of supporting you in your role here? Are there things the Board could do differently that would improve the organization? Do you have any general feedback about what we might do better as an organization?

Board Feedback Form

Below are some questions board members can be asked to answer as part of the evaluation process.

- What do you think are the key functions of the ED in this organization?
- In what ways is (name of ED) meeting your expectations of an ED?
- In what ways are they not?
- What are (name)'s strengths?

- Are there areas where (name)'s performance could improve?
- What do you see as (name)'s biggest accomplishments in the last x months?
- Is there anything you think (name) should have gotten done that (he, she) did not?
- What are the factors beyond (name)'s control that influenced the organization's successes and failures of the past year?
- How well do you think the board is supporting (name)'s work?
- How well do you think the other staff members are supporting (name)'s work?
- Is there anything else you want to say about (name)'s performance?
- Are there any suggestions you want to make?

Questions for Staff

- What do you think are the key functions of the ED in this organization?
- Is (name of ED) meeting your expectations of an ED?
- Are you getting what you need from (name) to be able to do your job well? If not, what do you need that you are not getting?
- What are (name)'s strengths?
- Are there areas where (name)'s performance could improve?
- What do you see as (name)'s biggest accomplishments in the last x months?
- Is there anything you think (name) should have gotten done that (he, she) did not?
- How well do you think the board is supporting (name)'s work?
- How well do you think the other staff members are supporting (name)'s work?
- Is there anything else you want to say about (name)'s performance?
- Are there any suggestions you want to make?

Outline for a Basic Performance Evaluation Meeting (as part of the larger process described above)

- ED presents her or his self-evaluation.
- Board members assigned the task of doing the evaluation meeting reflect back what they heard, ask questions, and provide their own reflections on that self-evaluation.
- Same people then provide feedback on the ED's performance based on conversations with Board, staff, and (in some cases) community partners, and in connection to the ED's job description and work plan.
- Same people and the ED go through a performance evaluation form together. (The ED should be very clear about what the written evaluation in their file will say).
- All discuss the development of the employee's work plan for the coming year and get a start on it (identify benchmarks, brainstorm roles).