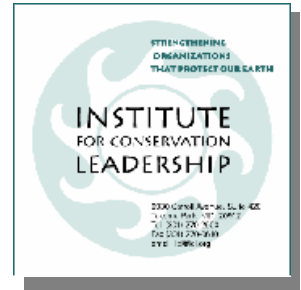


# Executive Director Evaluation - Generic Issues



(Your Name)

## *DIRECTIONS:*

Begin by reviewing the Executive Director's achievements against the the written goals from his or her annual workplan, which the Board and Executive Director agreed to. If such a workplan 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

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    don't know

*Taking overall responsibility for the organization's well-being*

1    2    3    4    5    don't know

*Providing program leadership*

1    2    3    4    5    don't know

*Providing leadership for staff*

From the Institute for Conservation Leadership *Executive Director Sourcebook*.

1      2      3      4      5      don't know

*Providing fundraising leadership*

1      2      3      4      5      don't know

2) *FUNDRAISING (30% of the time, according to job description)*

*Knowledge of foundations*

1      2      3      4      5      don't know

*Development of new foundation sources*

1      2      3      4      5      don't know

*Rapport/relationships established with foundation people*

1      2      3      4      5      don't know

*Knowledge of patrons*

1      2      3      4      5      don't know

*Development of new patrons*

1      2      3      4      5      don't know

*Rapport/relationships established with patrons*

1      2      3      4      5      don't know

*Adequacy of fundraising strategy*

1      2      3      4      5      don't know

*Adequacy of strategy implementation*

1      2      3      4      5      don't know

*Achievement of fundraising goals*

1      2      3      4      5      don't know

*Ability to motivate funders to help us in the funding world*

1      2      3      4      5      don't know

*Involvement of Board and Staff*

1      2      3      4      5      don't know

3) *PUBLIC RELATIONS (10% of time, according to job description)*

*Executive Director's image outside Board and Staff*

1    2    3    4    5    don't know

*Adequacy of national networking*

1    2    3    4    5    don't know

*Rapport/relationships established with clients in all constituencies*

1    2    3    4    5    don't know

*Image with its desired audiences*

1    2    3    4    5    don't know

4) *ADMINISTRATION (30% of time, according to job description)*

*Keeping all areas of work — program, fundraising and administration —on track and in balance*

1    2    3    4    5    don't know

*Identifying organizational weakness and needs and developing strategies to address them*

1    2    3    4    5    don't know

*Developing clear, thoughtful, and functional organizational policies*

1    2    3    4    5    don't know

5) *PROGRAM PLANNING AND IMPLEMENTATION (30% of time, according to job description)*

*Quality of project ideas*

1    2    3    4    5    don't know

*Operating Plan development and clarity*

1    2    3    4    5    don't know

*Adherence to plan during the year*

1    2    3    4    5    don't know

*Monitoring and evaluation of progress*

1    2    3    4    5    don't know

*Quality of organization's work*

1      2      3      4      5      don't know

*Number and nature of organizational accomplishments*

1      2      3      4      5      don't know

*Development of internal planning and monitoring systems*

1      2      3      4      5      don't know

**6) PROGRAM ACTIVITIES AND CONSULTING (part of the 30% program work, according to job description)**

*Effectiveness of work with client groups*

1      2      3      4      5      don't know

*Effectiveness in getting groups to pay for services*

1      2      3      4      5      don't know

*Effectiveness in assessing client needs*

1      2      3      4      5      don't know

*Extent of participation in all programs*

1      2      3      4      5      don't know

**7) BOARD OF DIRECTORS**

*Communication with Board*

1      2      3      4      5      don't know

*Motivation of Board*

1      2      3      4      5      don't know

*Seeking and abiding by Board decisions*

1      2      3      4      5      don't know

*Responsiveness to Board requests*

1      2      3      4      5      don't know

*Use of Board skills*

1      2      3      4      5      don't know

*Assistance in Board development*

1      2      3      4      5      don't know

8) *STAFFING*

*Quality of staff*

1      2      3      4      5      don't know

*Adequacy of staff compensation (all forms)*

1      2      3      4      5      don't know

*Motivation of staff*

1      2      3      4      5      don't know

*Success in getting staff to work together effectively*

1      2      3      4      5      don't know

*Adequacy of staff job descriptions and evaluation*

1      2      3      4      5      don't know

*Encouragement of personal and professional development*

1      2      3      4      5      don't know

*Appropriate definition of staff functions and positions*

1      2      3      4      5      don't know

*Adequacy and appropriateness of supervision of staff*

1      2      3      4      5      don't know

*Appropriateness of response to feedback from staff*

1      2      3      4      5      don't know

9) *FINANCIAL MANAGEMENT*

*Adequacy of financial records*

1      2      3      4      5      don't know

*Adherence to budget*

1      2      3      4      5      don't know

*Wisdom of spending and asset management choices*

1      2      3      4      5      don't know

*Adequacy of reporting to Staff and Board*

1      2      3      4      5      don't know

*Compliance with government requirements*

1      2      3      4      5      don't know

10) *INDIVIDUAL SKILLS AND PRACTICES*

*Work hours and habits, and use of time*

1      2      3      4      5      don't know

*Writing ability*

1      2      3      4      5      don't know

*Professional development activities*

1      2      3      4      5      don't know

*Speaking ability*

1      2      3      4      5      don't know

*Adequacy of compensation (all forms)*

1      2      3      4      5      don't know

*Personal style and impression*

1      2      3      4      5      don't know

*Accomplishment of professional and career goals*

1      2      3      4      5      don't know

*Use of staff and Board members to complement skills and compensate for weaknesses*

1      2      3      4      5      don't know

11) *OTHER*

*Specify the one area in which change or improvement is needed the most:*

*Other comments or observations:*

12) *SUMMARY*

*On balance, what kind of job has the Executive Director done?*

*Comments on Questions*

Question No.	Comment:
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
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