## Sample Executive Director Evaluation Form

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| 1. Overall Organizational Performance | Outstanding | Very Good | Fine | Improvement Needed | Don’t know |
| a. Works with the board and management staff to develop strategies for achieving mission goals and financial viability. |  |  |  |  |  |
| b. Appropriately provides both support and leadership to board. |  |  |  |  |  |
| c. Maintains and utilizes a working knowledge of significant developments and trends in the field. |  |  |  |  |  |
| d. Builds respect and profile for the organization in its various constituencies. Supports the overall field/movement in which the organization works. |  |  |  |  |  |
| e. Establishes ambitious goals for excellence and impact, and initiates, maintains, and adapts programs with excellence and impact. |  |  |  |  |  |
| f. Comments on overall organizational performance:  |

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| 2. COMMUNITY LEADERSHIP | Outstanding | Very Good | Fine | Improvement Needed | Don’t Know |
| a. Serves as an effective spokesperson. Represents the organization well to its constituencies, including clients, other nonprofits, government agencies, elected officials, funders, and the general public. |  |  |  |  |  |
| b. Establishes and makes use of working relationships with organizations and individuals in the field. |  |  |  |  |  |
| c. Sees that communication vehicles are developed and utilized well. |  |  |  |  |  |
| d. Comments on community leadership:  |
| 3. Administration & Human Resources | Outstanding | Very Good | Fine | Improvement Needed | Don’t Know |
| a. Establishes and leads an effective management team. |  |  |  |  |  |
| b. Recruits and retains a diverse staff (as the organization has identified diversity). |  |  |  |  |  |
| c. Maintains appropriate balance between programs and administration. |  |  |  |  |  |
| d. Ensures that procedures and organizational culture maximize volunteer involvement. |  |  |  |  |  |
| e. Ensures compliance with relevant workplace and employment laws. |  |  |  |  |  |
| f. Sees that employees are licensed and credentialed as required and that appropriate background checks are conducted. |  |  |  |  |  |
| g. Leads staff in maintaining a climate of excellence, accountability, and respect. |  |  |  |  |  |
| h. Comments on administration and HR: |
| 4. Financial Sustainability & Mission Impact | Outstanding | Very Good | Fine | Improvement Needed | Don’t Know |
| a. Assures adequate control and accounting of all funds, including maintaining sound financial practices. |  |  |  |  |  |
| b. Sees that program and activities are developed, executed, modified, and dismantled to maximize mission impact. |  |  |  |  |  |
| c. Works with the staff, finance committee and the board to prepare budgets, monitor progress, and initiate changes (to operations and/or to budgets) as appropriate. |  |  |  |  |  |
| d. Sees that official records and documents are retained; sees to compliance with federal state and local regulations (examples: Form 990, payroll withholding). |  |  |  |  |  |
| e. Develops realistic, ambitious plans for acquiring funds. |  |  |  |  |  |
| f. Jointly with the President and Secretary of the board, conducts official correspondence for the organization, and jointly with designated officers, executes legal documents appropriately. |  |  |  |  |  |
| g. Successfully involves others in fundraising and in earned income generation. |  |  |  |  |  |
| h. Establishes positive relationships with institutional funders, such as foundations, government agencies, churches, corporations, and so forth. |  |  |  |  |  |
| i. Establishes positive relationships with individual donors. |  |  |  |  |  |
| j. Comments on financial sustainability and mission impact:  |
| 5. Board of Directors | Outstanding | Very Good | Fine | Improvement Needed | Don’t Know |
| a. With the Board Chair, appropriately involves/does not involve board members in decisions. |  |  |  |  |  |
| b. Provides appropriate leadership to the board. |  |  |  |  |  |
| c. Sees that board members are kept fully informed in a timely way on the condition of the organization and important factors influencing it. |  |  |  |  |  |
| d. Sees that board committees are appropriately supported. |  |  |  |  |  |
| e. Works with the board officers to ensure that the board is effective as a body and that recruitment, involvement and departures of individual board members are effective. |  |  |  |  |  |
| f. Comments on the board: |
| g. Additional Comments:  |