



## TOOL KIT #4

# BOARD/STAFF RESPONSIBILITIES

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### FAQ – EVALUATION OF THE EXECUTIVE DIRECTOR

#### 1. Why is it important to conduct Executive Director Performance Evaluations annually?

The evaluation of the Executive Director by the Board is an important component of the Board's responsibilities. An annual, written evaluation both documents the Executive Director's achievements and any shortcomings, and helps the Executive Director understand areas for improvement and goal-setting.

Because the Executive Director acts both directly and indirectly through others to manage the organization, evaluating the Executive Director's performance is inevitably linked to evaluating the performance of the organization as a whole. As a result, many Boards incorporate evaluation of the Executive Director into the annual review of organizational performance and goal-setting for the coming year.

#### 2. What is needed for the Executive Director Performance Evaluation?

The requirements for Executive Director Performance Evaluations are similar to that of any employee of the organization. It is important to start with three things: an accurate job description, annual goals and benchmarks (which are related to the strategic plan), and an assessment tool. More information on these can be found on the Resource List for this Tool Kit.

The process should include both objective and subjective measures that are aligned with the organization's priorities. Examples might include: growing the donor base, increasing the number of people served, or obtaining new grants. Qualitative examples might include: building a cohesive and inclusive team, conducting ongoing staff development, and successful personnel recruitment and management.



#### 3. Who conducts the evaluation? How is done?

Typically, a committee of the Board leads the evaluation process and reports on the evaluation to the entire Board. Most frequently, the Board Chair leads the process, because she has the most interaction with the Executive Director on a day-to-day basis.

Most Boards of Directors involve only other Board members directly in the evaluation process. But, some also use feedback from the staff. Information from outside the organization regarding the performance of both the organization and the Executive Director (for example: funders, collaborating agencies, volunteers, and clients) can also be helpful, especially if obtained as part of ongoing program evaluation activities.

The Executive Director should perform a self-evaluation against the job description and benchmarks. Because the Board may not be aware of some accomplishments through the ongoing interactions in Board meetings, the self-assessment is especially important.



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### 4. Is the annual performance evaluation the only time the Board provides feedback to the Executive Director?

The Executive Director should receive feedback all year round. There should never be a surprise at the annual performance evaluation! Feedback can be informal, and might include a quarterly or semiannual more formal check-in. Feedback should be constructive but not intrusive.

Too often, performance evaluations (and job descriptions) are undertaken only when the Board has become unhappy with their Executive Director. A healthy working relationship includes two-way communication and feedback when things are working well, and when they are not. The annual formal evaluation is most effective when it is grounded in that relationship. It is an essential responsibility of the board.

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