

LOGO

Annual Performance and Planning Review: Executive Director
 A confidential evaluation of performance

SUMMARY OF POSITION:

Rating Key

- 5= Outstanding Performance
- 4= Above Average Performance
- 3= Average Performance
- 2= Below Average Performance
- 1= Inadequate Performance
- N/A = Not applicable; I don't know

I. Rate the performance of the ED on the following components

		5	4	3	2	1	n/a
Purpose and Planning							
1.	Leads the organization with a vision and philosophy that is well understood and effectively implemented.						
2.	Works with Board and Staff to set the strategic, long-range plans for the organization						
3.	Establish an annual work plan to assure progress in achieving short and long-range organizational goals						
4.	Strategically positions the agency to respond to trends, possibilities and opportunities						
5.	Creates and supports a work culture through inspired leadership that promotes teamwork, cross training, efficiency and excellent customer service						
Relationship with the Board							
6.	Keeps board informed of organization activities, opportunities, progress, problems and solutions						
7.	Provides the board with adequate information to help it reach decisions and establish sound policies						
8.	Makes judicious recommendations for board action and facilitates decision making						
9.	Facilitates the Board's governance, composition, and committee structure						
10.	Seeks board member ideas, suggestions and constructive feedback for improvement						
11.	Tactfully provides guidance and feedback to individual board members						
12.	Encourages participation of board members in meaningful discussion of issues						
Guiding the Staff							
13.	Shapes the organizational structure to most effectively and efficiently leverage human and financial resources						
14.	Maintains human resources policies that comply with regulations and promote effective operations.						
15.	Develops effective recruiting, training and retention programs for staff						
16.	Manages and motivates staff to strengthen the organization.						
17.	Ensures that yearly goals and objectives are developed and performance reviews are conducted						
18.	Communicates clearly at all staff levels to advance strategic goals						

Financial Management						
19.	Develops long range financial plans and an annual budget with review, approval, and support of the board of directors					
20.	Effectively manages the organization to meet annual and long-term financial objectives					
21.	Maintains appropriate systems for internal controls and grant compliance					
Fund Development						
22.	Secures the necessary restricted and unrestricted funds for organizational sustainability through diverse sources					
23.	Operates according to a fund development plan linked to the strategic plan					
24.	Effectively supervises fundraising activities and compliance with ethical standards and regulations					
Community Engagement						
25.	Serves as an effective spokesperson for the organization					
26.	Provides a public policy voice for the organization and ensures compliance with lobbying regulations					
27.	Increases the organization's visibility					
28.	Communicates effectively with external stakeholders					

II. Rate the ED's performance in making progress toward accomplishing the organization's strategic goals.

		5	4	3	2	1	n/a
1.							
2.							
3.							
4.							
5.							
6.							

III. Comments on ED's Performance

A. If you need to elaborate on or clarify any responses, please do so:

B. What impressed you the most about your ED's performance this year?

C. What specific recommendations do you have for your ED to improve performance? What are the most important professional development areas for the ED in the coming year?

D. What should be the priorities for your ED over the next year?