

Overview

Executive Directors should receive a formal evaluation from the Board of Directors at least once a year. Below is a template and some recommendations from SEA on how to conduct the Executive Director review process.

- Feedback from Sections 1 and 2 should be collected from board members and direct reports. Consider collecting additional feedback from other individuals with whom the Executive Director works closely, such as additional staff and community, school, or university partners.
- The Executive Director should also complete a self-evaluation using this template.
- A member of the board, or a small group of board members, should collect and compile all feedback into a single report. When compiling the ratings, give both the average and how many respondents selected each rating (outstanding, weak, etc.). Do not include the Executive Director's ratings in this compilation.
- Before sharing with the Executive Director, the board should review the compiled feedback and summary report to ensure awareness and agreement with the review, and to complete Section 3 - setting goals for the Executive Director in the coming year.
- After receiving and then reviewing the report with a member of the board and/or the Board Chair, the Executive Director should have the opportunity to respond, in person or in writing, to the full board.

Section 1: Executive Director Responsibilities

Rate the Executive Director's level of effectiveness in each of the following areas. If you are unfamiliar with the Executive Director's performance in a certain area, leave it blank.

1 = unacceptable, 2 = weak, 3 = average, 4 = good, 5= outstanding

Responsibility	Rating
Vision & Strategy: Does the ED have a clear vision for the organization and strategy for achieving the vision?	
Staff Management: Does the ED select, develop, and retain qualified staff, and build positive morale among them?	

<p>Board Management: Does the ED engage Board members positively, utilize them effectively, and provide them with the information necessary to make strategic decisions about the organization’s growth?</p>	
<p>Program Results: Does the ED lead a program that achieves strong results in terms of student engagement (attendance, retention) and student success (academic, squash, character, etc.)?</p>	
<p>Fundraising and Resource Development: Does the ED generate the needed resources for the organization? Does the ED communicate and work effectively with all types of donors (individual, foundations, corporations, etc.) and with events?</p>	
<p>Operational Management: Does the ED ensure that the organization has systems and policies in place related to areas such as accounting and fund management, donor management, personnel management, risk management, and data management?</p>	

Section 2: Leadership Qualities

Share bullet points or brief commentary in response to the questions below.

1. What are the major strengths of the Executive Director as a leader of the organization?

2. What are the areas in which the Executive Director would most benefit from additional development of skills or knowledge?

3. What actions would you like to see the Executive Director take to strengthen his/her leadership of the organization?

Section 3: Goals

After compiling the results of the survey above, the Board Chair and any other board members responsible for leading the review process should complete this section.

List 4-6 goals for the Executive Director to focus on during the upcoming program year.