

Evaluating Your New Executive Director – The Interim Review

PURPOSE

1. To decide if this is the right ED for the job – or for the ED to decide if this is the right job for him/her
2. To articulate in writing the Executive Directors' goals and objectives for the next year (and longer if a strategic plan is in place)
3. To strengthen the partnership between the Executive Director and the Board
4. To establish a healthy and collegial process for ongoing feedback and support

QUESTIONS THE INTERIM EVALUATION SHOULD ANSWER

For the Board:

- What impact has this Executive Director had in their first months in office?
- How well has the ED fulfilled our expectations at this point in time? (Caveat: How clearly were those communicated to the ED at the time he/she was hired?)
- How is this Executive Director perceived among key stakeholders outside of our organization?
- Have we established the ideal relationship between the Board and the Executive Director? What do we need to do to create that?
- Is this an Executive Director we want to keep? If yes, what can we do to ensure that happens? If not, what are our next steps?

For the Executive Director:

- Is this job all that I expected? Is it a position that I want to continue serving in?
- What does the Board appreciate about my performance to date? Staff? Other constituents?
- Where can I improve?
- What is working well about my relationship with the Board? Individual board members?
- What can be improved in the way I work with the Board? How?
- What does the Board want me to accomplish in the next year? Over the next five years? How does this mesh with what I'd like to accomplish?
- What do I need from the Board to succeed in this position?

PROPOSED PROCESS

Ask the Executive Director to complete the following:

1. A written self-assessment of the last six months
 - Most important accomplishments
 - Other activities you are proud of
 - Incompletes/disappointments

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- How the job aligned with your expectations
2. Job Plan for the next 12 months
 - Goals and Objectives
 - Description of key relationships, including the ideal relationship with the Board
 - Time to priorities
 - Personal Development Plan
 3. Feedback on your partnership with the Board –what’s working, what could be improved

For the Board to complete

Appoint a small committee or team to manage the process. Set a timeline (try to finish in a month)

Gather & review background materials:

1. Executive Director self-assessment & other supporting materials (e.g. financial reports, Ex Director monthly reports)
2. Feedback from other Board members (options: discussion, survey)
3. Optional: Gather information from key staff
4. Solicit and summarize input from critical Community stakeholders (a few interviews)

For the Board to discuss in executive session prior to the feedback team meeting with the Executive Director

After reviewing the self-assessment:

- Did he/she meet our expectations? How clearly were those expectations communicated to her/him?
- What do we see as our Executive Director’s greatest strengths?
- Is this the right Executive Director for this job? If yes,
- What are the areas we would like to see improvement or further development? What are our suggestions for how this can occur?
- What can we do to better support our Executive Director?

Feedback Discussion with the Executive Director

You may want to delegate this to a small team.

- Meet with the Executive Director to provide feedback from the Board.
- Provide initial feedback on the 12 Month Job Plan
- Agree on what will be in the final evaluation document for the record (2 pp)

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- Reviewing team completes the evaluation document and provides to the Executive Director for comment. Any necessary revisions are made.

Discussion between the Executive Director and the Full Board

- Team shares the final evaluation document with the Board and answers any questions
- Executive Director reviews and solicits feedback on the draft 12 Month Job Plan with the Board.
- Board approves the revised Job Plan.