

# 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)

## **Evaluating Your New Executive Director – The Interim Review**

- 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.