

Nine Best Practices for Executive Director Performance Reviews

1. **Focus on the organization.** *Design a performance review that encourages participants to focuses first and foremost on the organization's performance and results.*
2. **Use an evaluation tool that collects qualitative feedback, not just quantitative.** *Although the "check-a-box" tools are great for increasing the participation rate of board members and other stakeholders, the feedback is far less valuable for the executive director.*
3. **Align with executive's job description.** *Design or use an evaluation tool that solicits feedback about the (core competencies) knowledge, skills, and abilities s/he is expected to possess and the work s/he is expected to perform (results against goals).*
4. **Take time for serious reflection.** *Take full stock of your year. This is often the one time of year executives and board members reflect on all they've accomplished. Be honest with yourself about what the organization achieved and what it didn't.*
5. **Conduct a self-evaluation.** *Use an evaluation tool that compels the executive director to provide a self-evaluation. Have him/her answer the same questions the board and other stakeholders answer about him/her. It provides an essential point of comparison.*
6. **Commit to a 360 degree review.** *Feedback from board members is often of minimal value to the executive director since board members rarely see the executive more often than monthly, if that, and only for a few hours. The best performance reviews are those that solicit feedback from the other employees and other key stakeholders who are in a position to judge his/her work. These tools are not, however, best practice for organizations with small (5-6) staffs.*
7. **Discuss compensation.** *Although every executive longs for a well-timed and genuine thank you, a high performing executive deserves to have the topic of compensation raised following a discussion of his/her performance. This is true regardless of the organization's financial situation, as there are limitless ways to reward service that don't cost the organization.*
8. **Set new goals.** *An effective performance review leads to increased clarifications of organizational goals and expectations. It should also lead to the formation of the executive's performance and professional development goals for the coming year.*
9. **Review the executive 365 days a year.** *The most effective review processes are those that are continual. Make sure your organization has mechanisms for board and staff (other stakeholders, if possible) to provide feedback beyond the formal annual review.*

Ten Steps to an Effective Performance Review

1. Board develops policy regarding executive director performance review.
2. Board chair designates a person or committee (i.e. Executive Committee) to oversee/manage executive director's performance review.
3. In alignment with policy, designated board member/committee develops approach regarding executive director performance review.
4. Designated board member/committee discusses review process with executive director. Solicits input and reaches consensus.
5. Performance feedback gathered through agreed-upon survey instrument.
6. Results analyzed and reported to full board of directors. Board reaches consensus about how results are shared with executive director.
7. Results shared with executive director in face-to-face meeting with two board members (i.e. Board President and Vice President).
8. Executive director is provided an opportunity to formally respond to review results.
9. In addition to discussing last year's performance, performance and professional development goals are set for upcoming year.
10. Evaluation is signed and filed away in executive director's personnel file.