



EXECUTIVE DIRECTOR EVALUATIONS



ABOUT THE SOLUTION CENTER

The Main Street Solution Center is a free access portal to resources for communities and organizations working to revitalize and strengthen their local economies. The Solution Center's curated resources are designed to help guide and inspire local leaders and advocates as they navigate the complexities of downtown and neighborhood business district revitalization and economic growth.

ABOUT THE PARTNERSHIP

This Main Street Solution Center publication was underwritten by Michigan Main Street and Main Street Iowa. Their generous support demonstrates a shared vision and ongoing commitment to freely share knowledge, experience, tools, and best practices to fuel revitalization and economic growth in their own communities, and in locales spanning the nation.



ABOUT THE CREATORS

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EXECUTIVE DIRECTOR EVALUATIONS

Supervising and evaluating the executive director – or the organization’s chief staff person – is among the most important responsibilities undertaken by the boards of downtown and district management organizations. Yet, for all its importance, a meaningful and effective process designed to support and strengthen the organization’s chief executive need not be overly complicated.

PERFORMANCE STANDARDS

One of the first tasks is to develop a set of performance standards. The executive director’s job description should already outline areas of general responsibility and, thus, should serve as the foundation for the performance evaluation tool. Job descriptions vary from organization to organization, but areas common to downtown and district management organizations include:

- Providing leadership and assistance to the board in developing and reviewing the organization’s mission, goals, and strategies.
- Managing and directing the organization’s operations and activities.
- Implementing board policies and directives.
- Reporting the organization’s activities to the board.
- Ensuring the organization’s financial resources are properly managed, and reporting the organization’s financial position to the board.
- Hiring, supervising, and evaluating staff.
- Recruiting, developing, supporting, and monitoring the work of volunteers.
- Communicating the goals, purposes, and programs of the organization to partner organizations, the news media, and other audiences.
- Assisting the board in developing and implementing a fundraising and resource development plan.

The simplest approach might involve re-formatting the job description document as a form to collect input from board members, the executive director, and other selected individuals (e.g. government liaisons, colleagues, major funders, staff, etc.) from whom input is sought. An accompanying grading scale may also be used to benchmark and track performance.

A second approach to, or component of, the evaluation might identify specific, measurable objectives translated from the job description and other planning documents, like an organization’s annual work plan or strategic plan, to benchmark and track the executive director’s progress and performance.



Suppose your organization has placed a priority on improving its visibility with several critical audiences. Rather than saying the executive director is responsible for improving the organization's image-building communications and visibility, you might choose to establish a performance goal in one of the following ways:

Example A

The executive director will increase the frequency of written and in-person communications initiated by the organization with local government policymakers, including quarterly reports to the director of Community Development and the chair of the City Council's Development Committee on the organization's accomplishments, plans, and needs.

- This goal provides clear direction for the executive director, and performance can be measured by verifying quarterly reports are delivered, at minimum, to the individuals and groups identified.

Example B

The executive director will oversee the development and execution of a plan that includes a timeline, benchmarks and goals for increasing the organization's positive exposure using tools and media that reach and connect with our five target audiences, and will provide quarterly updates to the board on the plan's effectiveness.

· This goal does not identify the exact means by which the organization's positive exposure will be enhanced, or the specific media and tools that will be used to connect with the five targeted audiences - that would be the purpose of the plan. This approach, for performance evaluation purposes, provides opportunities for board input and checkpoints to ensure the plan - which also, ultimately, will be reviewed for its effectiveness - is in place and implementation activities remain on track.



THE PERFORMANCE EVALUATION PROCESS

Key Steps

Much like the evaluation tool and selected performance standards, the evaluation process can look different from organization to organization. Still, a well-orchestrated process designed to establish the board's expectations, clarify responsibilities, enhance communications, identify professional development opportunities, and strengthen the organization's leadership includes:

- Developing performance standards and a form to gather input.
- Determining who should conduct the evaluation – usually assigned by the board and comprised of at least two or three board members, often including the board chair and treasurer.
- Gathering input from board members and, where appropriate, from external partners, such as local government officials, partner organizations and colleagues, major funders, etc.
- A self-evaluation, using the same form, completed by the executive director.
- Compiling and summarizing individual responses, along with the executive director's self-evaluation and the committee's compensation recommendation, to create a consolidated, overall evaluation report.
- Presenting the evaluation report to the executive director, usually in a one-on-one meeting with the board chair, to discuss findings and conclusions, to outline a plan for furthering professional development, and to discuss performance standards for the upcoming year.
- Presenting the evaluation report, along with any written comments submitted by the executive director included as an attachment, to the full board for its formal approval.



THE PERFORMANCE EVALUATION PROCESS

Best Practices

Use the following hints and tips, and refer to tools and resources listed at the end of this document, as guidance for creating or fine-tuning the performance standards and process used to evaluate your organization's chief executive.

- Be diligent, and plan and work accordingly, to complete the annual performance evaluation just prior to or on the executive director's employment anniversary.
- Get a head start by collecting examples of performance evaluation forms from peer organizations. Adapt approaches and questions that are relevant to your organization, but remain mindful of your existing executive director's job description and the organization's distinct purpose, mission, and goals.
- Crafting performance standards and creating the evaluation tool is often a job best suited to a smaller committee comprised of board members, with input from the executive director. The full board, however, should be asked to review and approve the committee's draft.
- Incorporate a grading system (e.g. Exceeds Requirements, Achieves Requirements, Needs Improvement, Fails to Meet Requirements, Not Sure) with space for comments to help minimize time required of individuals to complete the evaluation tool, and to aid efforts to tabulate and summarize responses.
- Conduct periodic, less formal interim reviews throughout the year to update progress on performance standards, troubleshoot obstacles, re-examine time and resource commitments, and to help maintain an open performance-related dialog between the board, the board president (and/or the executive committee or personnel committee), and the executive director.
- Use the evaluation process to identify opportunities for, and to direct resources and support toward, furthering your executive director's professional development.
- Some aspects of the performance evaluation may best be accomplished by a board-appointed committee of the board (e.g. executive committee or personnel committee). However, all board members should be asked to complete the evaluation form, and the final evaluation report should be approved by the full board.
- Upon conclusion of each annual review, take time to ensure performance evaluation standards, the executive director's job description, and relevant organization governing, policy, and planning documents are in sync.



ADDITIONAL RESOURCES

[A Simple Way to Conduct an Executive Director Performance Review \(Free Template\) by Joan Garry](#)

[Executive Director Performance Evaluation Form Template | The Management Center](#)

[Reviewing the Executive Director Performance | Sask Culture](#)

[City of Howell \(MI\) DDA/Main Street Director Performance Appraisal Form](#)

[Main Street Director Evaluation Form](#)

[Employee Evaluation Form](#)

