Sample CEO Evaluation

As a board member, you have an important role to fill. Regularly evaluating the performance of the Executive Director ensures good communication and a strong working relationship.

Please fill out this survey and return to: .

Please return this survey by:

From your perspective, rate the Executive Director on how well you believe carries out each of the following roles and responsibilities. Please use “E” for Excellent, “S” for Satisfactory and “NI” for Needs Improvement. Use the letters "NS" if you are Not Sure; or "NA" if Not Applicable. Comments are also invited.

Your Name: (Optional)

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| --- | --- | --- |
| Executive Responsibility | Rating | Comments |
| Leadership and Board Relationship |  |  |
| 1. Provides a clear vision for the future direction of the organization; upholds and promotes the mission and vision |  |  |
| 2. Works well with the board and its officers and provides clear information in a timely way. Provides the needed supports for the board to function effectively |  |  |
| 3. Effectively leads the formation and implementation of the Strategic Plan, including accomplishing the annual goals set out in the plan |  |  |
| 4. Keeps the board informed regarding current trends, problems and opportunities that are important to the future of the organization |  |  |
| Financial Management and Compliance |  |  |
| 1. Provides appropriate financial stewardship for the organization, including presenting an annual budget and operations consistent with the approved budget |  |  |
| 2 Assures that proper financial controls are in place to guard against fraud and mismanagement |  |  |
| 3. Maintains official records and documents, and ensures compliance with federal, state and local reporting requirements. |  |  |
| 4. Regularly presents clear financial information to the board so that board members can exercise prudent financial oversight |  |  |
| Operational and HR Management |  |  |
| 1. Maintains the necessary financial, human resources, and operational policies and procedures to keep the organization running smoothly |  |  |
| 2. Successful in recruiting and retaining a highly qualified staff and in administering an effective personnel program that includes position descriptions, performance, standards, performance appraisals and a compensation system |  |  |
| 3. Effective communicator with staff, and able to motivate and encourage staff effectiveness, including providing opportunities for professional development |  |  |
| Fundraising |  |  |
| 1. Develops realistic yet ambitious fundraising plans along with the Board, and regularly monitors progress against goals |  |  |
| 2. Maintains strong relationships with various funding sources, including grantors, corporations and private donors |  |  |
| Program Development and Delivery |  |  |
| 1. Effectively leads the development of new program plans and initiatives and monitors their effectiveness |  |  |
| 2. Regularly monitors program goals and quality standards and consistently meets goals |  |  |
| 3. Demonstrates creativity and initiative in creating new programs that align with the organization’s mission, keeping apprised of the latest developments in the field. |  |  |
| Community Relations |  |  |
| 1. Effective public spokesperson for the organization, representing it well in its relationship with government officials, business and community leaders and the media |  |  |
| 2. Establishes and maintains strong working relationships with community organizations, funders, donors and other nonprofit organizations |  |  |
| Personal Skills |  |  |
| 1. Strong and clear communicator, both written and verbal |  |  |
| 2. Good follow-through |  |  |
| 3. Organized and efficient |  |  |
| 4. Strong ethical base, well regarded by others |  |  |

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| Open-ended comments: |
| 1. What are 3 highlights or accomplishments of the past year that the Executive Director made possible? |
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| 2. What are the Executive Director’s strengths? |
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| 3. In what ways can the Executive Director strengthen job performance? |
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| 4. Overall, how would you assess the Executive Director’s performance over the past year? |
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| 5. Additional Comments: |
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