

Evaluating The Executive Director: Part 2 - Making Executive Director Evaluations Effective

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In [part one](#) of this article, I listed a number of reasons why evaluations of the executive director frequently fail. In part two, I discuss some ways to conduct a successful evaluation.

Effectively evaluating your organization's executive director may not be simple, but it is possible. It requires taking away "the box" that has traditionally defined your approach to the evaluation process (e.g., evaluation forms, annual evaluations, focusing strictly on the executive director's behaviors). The box must be replaced with year-round communication that focuses on the entire system, of which the executive director's actions is just one part.

If the evaluation is to be system-wide, a frank discussion between the board and executive director must be the first step. Put on the table issues such as the organization's vision and values, its overall goals for the next three years, what might be seen as a logical and equitable division of responsibilities, the desired degree of board/staff interaction, and the expected levels of performance on everyone's part. Decide what must be accomplished the first year, the second year and the third year, then what ideally should be accomplished. Come to a consensus about the roles both the executive director and the board members are to assume in helping the organization reach these goals. Let's say, for instance, that together you agree that the organization will raise \$300,000 the first year through direct solicitation. The board is committing to serve as links and make most of the asks. The executive director agrees to prepare the case statement, provide solicitation training, accompany board members on solicitations targeting a minimum \$5,000 contribution and coordinate the recognition activities.

The next step borrows from an old paradigm (no sense throwing out the baby with the bath water). Specify objectives for each of the identified roles. State the desired end results in such a way that everyone will know when the objectives have been met. This usually means making the objectives measurable. Zeroing in on the case statement from the above example, you might agree that the successful case statement will be one page, be written in an active voice, and be grammatically correct. It will convey the value of the organization and the worthiness of its mission. It will include a brief history of the organization, a summary of its track record, a statement of its need and the good that will be done in the community. And, it will be completed by September 15, 2003. As a side note, this is a good time to also discuss the criteria levels that will be required for any increase in the executive director's salary.

When setting the criteria for success be aware that traditional measuring sticks such as the number of programs offered or clients served may actually prove meaningless when trying to demonstrate mission achievement. It may be far more beneficial to your organization, for example, that your executive director is able to build relationships,

facilitate participation, listen and generate commitment because, by so doing, he/she creates a strong, yet flexible entity that is able to perform in any situation. If so, the criteria you set must be able to measure these more nebulous competencies.

You might facilitate the process of identifying your objectives and the criteria for their success by having both the executive director and the individual board members write out what they believe to be their own and the other's responsibilities. Compare lists, negotiating wherever differences exist. You will encourage an interactive exchange by positively reinforcing people for laying all their cards on the table. The idea is to reach consensus about what has to be done, the priority of each responsibility and who will be responsible for doing it.

We all know that people will be more committed to achieving objectives that they have written themselves. I like to see the entire board involved with the executive director in the process of writing their own and each other's objectives for a reason. The resulting objectives tend to reflect more diverse thinking, more creativity in their approach, and a broader understanding of how each role impacts the organization. Such involvement also ensures everyone's expectations will be similar and, perhaps equally important, the process serves as a leadership development tool for board members.

Unfortunately, the lists you now have of executive director and board member objectives and their priorities are good only for the moment. In our rapidly changing world, organizational responsibilities are always subject to change. The board and executive director need to formally assess -- at least twice a year -- whether the objectives and priorities are still relevant and important. I've seen too many resources wasted on objectives that were in a plan but no longer had value. When a change is indicated, the process of consensus building must begin anew. Similarly, your measurement criteria cannot be set just once early in the year with the expectation of declaring success or failure late in the year. Rather, they too are dynamic, requiring constant renegotiation

Renegotiation will be relatively painless if the board and executive director remain on a similar wavelength throughout the year. This is possible through the use of regular updates, frequent phone calls and the occasional one-on-one visit over coffee. Updates -- whether in the form of weekly, biweekly or monthly email messages, fax broadcasts or briefing papers -- keep everyone current. Phone calls and one-on-one visits give people the opportunity to raise concerns or exchange perspectives on critical issues. Because they are private exchanges people tend not to grandstand. After all, there is no audience. Instead, they strive to understand each other and the situations each face. If there are problems or issues that still require resolution, it's important to raise them at a board meeting. The focus, though, must be on the future -- what can be done and how -- not on what hasn't been done and why.

The intent of such an ongoing exchange is to eliminate the once-a-year attempt at course correction that rarely results in any lasting change. However, there does remain value in, once a year, formally reviewing everyone's accomplishments. A written summary serves a base from which all can evaluate their personal impact on the organization, and begin

brainstorming for the future. Such reports should be shared in a board meeting. The board can then respond to their colleagues and the executive director with their comments and feedback. If there is anything that would best be discussed in private, two or three representatives from the board can meet with the executive director or one of their colleagues, again staying as future oriented as possible. Typically, members of the governance or executive committee provide this feedback, but you might opt to use either a new board member who isn't invested in the way things are or a board member with personnel experience.

I mentioned earlier that it is valuable to spell out the criteria an executive director must demonstrate in order to merit a raise. Whether or not you take this step I would keep any evaluation meetings separate from discussions of salary. You are looking to create a collaborative situation rather than an adversarial one. The last thing you want is to set the executive director up to feel as if he or she has to defend his/her accomplishments as being worthy of an increase.

Evaluation can improve the functioning of your organization, but only if it focuses on the whole system -- not just the executive director. Looking at the part that each person plays in furthering the organization's mission and key objectives creates a true working partnership between the board and executive director. Isn't that what it is all about?

Editor's note: Our thanks to Terrie Temkin for her contribution to Nonprofit Boards and Governance Review. More information about Gayle can be found at:
<http://charitychannel.com/resources/Detailed/502.html>

FOR MORE INFORMATION

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