

Nonprofit Governance and Management, Third Edition

APPENDIX 9

SAMPLE EXECUTIVE OFFICER EVALUATION FORM

***Practical Advice Note:** There is no universal template for Executive Officer evaluations. Evaluations need to be tailored to specific organizations and to the goals and priorities established by the board and the Executive Officer. Nonetheless, it may be helpful to consider the following areas when developing a format for evaluating an Executive Officer. Bracketed language contains suggestions for the types of matters to be evaluated/discussed under each general heading.*

Evaluation of Executive Officer

[Date]

1. Advancement of Mission of the Organization. [Specific areas for comment might include one or more of the following:
 - a. Vision for the organization
 - b. Strategic plan development/implementation
 - c. Program oversight and implementation
 - d. Outreach to community, donors, and other constituents
 - e. Status of the organization relative to peers in same field of endeavor]

2. Management of Organization Administratively. [Specific areas for comment might include one or more of the following:
 - a. Implementation of specific administrative tasks previously identified by board
 - b. Oversight of the financial/accounting reporting process and internal controls
 - c. Focus on general administrative matters, including
 - i. Communication with staff
 - ii. Staff assessment and development, staffing levels, HR policies and staff morale
 - iii. Interdepartmental cooperation/coordination]

3. Relationship with Board as a whole and specifically with Chair and Committee Chairs. [Specific areas for comment might include one or more of the following:
 - a. Communications
 - b. Cultivation
 - c. Sensitivity to specific concerns of board leadership/members]

4. Accomplishment of Other Specific Goals. [For matters not encompassed elsewhere in review]

5. Areas for Future Focus or Attention. [To identify specific areas of weakness, or areas that need to be prioritized for greater attention or focus.]