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# A Simple Way to Conduct an Executive Director Performance Review

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(You can visit the original blog post here: <https://joangarry.com/ed-performance-review>)

**Step 1:** Create an evaluation team – at least one other person but preferably 2 - 3. As board chair, you should not do this solo. Tell the group it will be a simple process.

**Step 2:** Find the job description you worked so hard on when you went looking for this E.D. you are evaluating. Using this job description create a Word document with spaces between each responsibility and each attribute. Voila! You have an evaluation form AND a self-evaluation form for the E.D.

**Step 3:** Did you by any chance work with your E.D. to create annual goals (she asks hopefully)? If so, create a second or third page to your Word doc with those goals listed. Voila! An even better evaluation form.

**Step 4:** Meet with the team and create a timetable. Work backwards. When do you want the review to be done (hint: BEFORE the anniversary date)? Back into milestones. When do you want the self-evaluation back from the E.D.? If you are asking all board members to weigh in, give them a date (with ample time for someone to synthesize the results.)

**Step 5:** With the self-evaluation and board member synthesis in hand, your committee meets for a solid 90 minutes and compares the self-evaluation with the board synthesis. Where is there alignment? Where are there key differences? Look at the goals in the same way. Then craft talking points for the real time conversation that should occur between the board chair and the E.D.

**Step 6:** You'll need a volunteer to write something. It should be carefully and diplomatically written. It will be handed to your E.D. and every word will be scrutinized.

**Step 7:** Meet IN PERSON. Set aside TWO HOURS. Walk through the document that the committee sent to the E.D. that synthesizes board feedback and compares that with the self-evaluation. The outcome of this meeting should be a shared understanding of the plusses and deltas re: performance and areas of focus for the coming year. Those areas of focus should be written in an email follow up from the board chair to the Executive Director so that the E.D. can then draft annual goals.

**Step 8:** Executive Director submits goals to the board chair and the two shape them for presentation to the full board.

**Step 9:** Evaluation Committee should then meet once more to talk about compensation and any increase for the coming year. If your organization is not in a position to add compensation (financial issues), the board should develop some other non-financial ways to reward a strong performance. The compensation should be approved by at least the Executive Committee of the board.

**Step 10:** Board chair meets IN PERSON to discuss compensation. Follow up in writing along with an appreciation of the E.D's service during the past twelve months.

*All ten steps should be complete on or before the anniversary date.*

