

Executive Director Evaluation and Development Kit

What this is

This kit guides the person coordinating an executive director review through a full year of evaluation and development. It includes an evaluation rubric, an annual calendar, working forms, meeting agendas, feedback surveys, and a fictional example.

Why this exists

Preparing an annual review can mean rebuilding forms, searching past reports, and trying to turn different opinions into useful feedback. The purpose is to establish shared expectations early, keep evidence available throughout the year, and turn the review into an agreed development plan.

How to use this

Start with this guide, then set the calendar and responsibilities with the executive director and the authorized board representative. Use the editable Word files for your organization and the combined PDF for reading. The example shows how the documents connect; its dates, results, and people are fictional.

Who this is for

You may be a board chair, a governance committee lead, or another person authorized to coordinate the review. The executive director contributes reflection, evidence, and feedback about board support. Confirm who may approve the evaluation before beginning; coordinating the process does not grant authority to make employment or compensation decisions.

How this saves you time

You begin with matching forms and expectations, so you can adapt one process instead of assembling unrelated templates. The evidence record points back to reports you already use. Before the final meeting, you can find the relevant result and its context without asking the executive director to reconstruct the year. The agendas then turn those records into decisions, development goals, and board commitments you can revisit.

This kit does not promise a specific number of hours saved. During your first year, track preparation time and repeated requests for information. Compare later reviews with that starting point to see which parts reduce work for your organization.

Scoring expectations

A section is a group of related expectations. An expectation describes a specific part of the role. A score level describes the practice that supports a particular score. Evidence means a dated example or record that helps explain what happened.

Use the agreed role

Interpret each expectation within the authority, resources, and responsibilities agreed for the executive director. Record adaptations before use rather than applying a new standard retrospectively.

Review a pattern of work

For repeated work, consider examples across the review period and more than one occasion. Explain the significance and limits of a single event. Include evidence that challenges the initial interpretation.

Choose the supported description

Read all four descriptions. Select the best supported description and explain mixed evidence. A score of 4 requires evidence of the expected practice at 3 and the additional practice at 4. Do not choose a higher score only because someone is well regarded.

Separate results and context

Consider both the executive director practice and the outcome. A missed revenue target does not by itself determine the score; examine the agreed plan, execution, board commitments, and conditions affecting the result.

Keep survey responses separate

The surveys use five response choices about people's experiences. Do not convert those numbers directly into these four performance scores or average them together.

Record differences clearly

Reviewers discuss different judgments using the same evidence. Record the chosen score, reason, executive director response, and any unresolved question. Do not use fractional scores to conceal disagreement.

Avoid unsupported totals

Record each expectation separately and write a section summary where useful. This kit does not automatically average scores or create an overall score. Never count Not applicable or Insufficient evidence as zero.

These descriptions support developmental review of ordinary work patterns. A serious isolated incident may require a separate personnel review under the organization's procedures. Document it appropriately rather than forcing it into a description of repeated behavior or minimizing it because it occurred once.

Staff Leadership and Development

Staff development and coaching

This section examines how the executive director develops staff, delegates work, and maintains fair and respectful working conditions.

Evidence to consider

Review supervision schedules, agreed development goals, examples of actionable feedback, access to learning opportunities, and follow-up on staff growth.

Score level	Performance description
4 Exemplary	The ED meets Proficient expectations and adjusts development support using staff feedback and demonstrated progress. Evidence shows staff applying new skills to agreed responsibilities and sustaining that progress.
3 Proficient	The ED provides direct reports with scheduled supervision, specific feedback, and development goals connected to their responsibilities. Follow-up identifies progress and adjusts support when a staff member needs a different approach.
2 Developing	Supervision or development goals are in place, but feedback is too general or follow-up is incomplete. Staff have limited guidance on what to improve or how available support will help.
1 Needs Improvement	Direct reports repeatedly lack necessary feedback or support after a need has been identified. Performance concerns remain undocumented or unaddressed until they substantially interfere with agreed responsibilities.

Record the score and a brief evidence-based reason in the Evaluation Summary and Development Plan. Add detail when a concern, disagreement, or development priority needs explanation.

Plan the midyear and end of year evaluations

When	Work to complete	Person responsible and actual dates
During the first month of the evaluation year	Confirm role expectations, goals, evidence sources, access, and board commitments.	[Person and date]
Monthly or quarterly throughout the evaluation year	Review goal progress and update evidence during existing meetings. Discuss concerns and support as they arise.	[Person and dates]
Three to five business days before the midyear evaluation meeting	The executive director shares a reflection and goal update. The reviewer shares feedback one to two business days before the meeting.	[People and due dates]
At the midyear evaluation meeting after six months of work	Use the 70 minute agenda to discuss progress, exchange feedback, and agree on any changes to goals or support.	[Facilitator and meeting date]

Midyear evaluation example

This fictional example follows the 70 minute agenda at Harbor Learning Collective on July 15, 2027. The reviewer is the board's authorized evaluation coordinator. Use the talking points to prepare your questions, then listen to the actual response. The possible ED responses illustrate a conversation; they are not answers to expect or record in advance.

Check in and purpose for 5 minutes

Reviewer talking point: How are you arriving today? I want us to recognize progress, understand what is getting in the way, and leave with clear commitments from both of us.

Possible ED response: I feel good about the program work, but I have been spending more time on approvals than I expected.

Agreement or note: The reviewer adds approval questions to the goal discussion and confirms the meeting outcomes.

Executive director reflection for 10 minutes

Reviewer talking point: Which change has made the biggest difference since January? What would you want the board to understand about the work behind it?

Possible ED response: Two program areas now have written responsibilities and decision limits. Staff can complete routine work without checking every choice with me. The third area is still unclear.

Agreement or note: The notes recognize completed agreements while identifying the remaining gap.

Goals and evidence for 15 minutes

Reviewer talking point: Let's compare the three areas with the January goal. What do the agreements and meeting notes show, and where do staff still need clarification?

Possible ED response: The third lead knows what to complete but is unsure which spending decisions require approval. The board policy is available; I have not yet translated it into that person's agreement.

Agreement or note: The ED will complete the third agreement by August 15. The next review will check whether staff can explain the decision limits.

Midyear feedback and agreements

Board feedback to the ED for 10 minutes

Reviewer talking point: The written agreements are a useful improvement. The remaining question is follow-through on the third agreement. What would help you complete it and check that it is understood?

Possible ED response: I need to protect time to finish it, then discuss two realistic examples with the lead. Sending a document alone will not be enough.

Agreement or note: The ED will meet with the lead by August 15 and record the examples discussed.

ED feedback to the board for 10 minutes

Reviewer talking point: What have we done that helped? Where has the board made your work harder or left you waiting?

Possible ED response: Approving the spending policy helped. Separate requests from board members sometimes compete with staff priorities. I need a clearer route for those requests.

Agreement or note: The chair will discuss the request process with board leadership before the August board meeting. This is a board commitment, not an ED performance finding.

Adjustments and support for 15 minutes

Reviewer talking point: The goal can remain in place. Let's name the next steps and the support each of us will provide, including how we will know they happened.

Possible ED response: I will complete the agreement and bring the first examples to our September check-in. Please bring the result of the board discussion about requests.

Agreement or note: ED: third agreement by August 15. Chair: request-process discussion in August. Both: review implementation at the September check-in.

Next steps and meeting feedback for 5 minutes

Reviewer talking point: We have read back the commitments. What was useful today, and what should I change for the next evaluation conversation?

Possible ED response: The examples made the feedback clear. Please send the board feedback before the meeting again so I can prepare my response.

Agreement or note: The reviewer will circulate notes within two business days. Both participants confirm the September check-in date before leaving.