

HOW TO EVALUATE AN EXECUTIVE DIRECTOR

PROVIDING A POSITIVE FRAMEWORK

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Role Of Executive Director

- Baseline expectations
- Some duties are clearly defined
- Leadership – not so easy to define
 - BUT can look at Vision vs. Implementation (i.e. big picture vs. small picture)
 - Does ED have well-articulated vision of “where we are going”
 - On day-to-day level, how is ED implementing that vision

Role Of Executive Director

- Establish proper boundaries of relationship –board member input should generally be in the form of “suggestions” not “demands”.
- If the Board of Commissioners does not **guide** and the Executive Director cannot **manage** in a fiscally sound and productive manner, the housing authority will not be able to provide decent housing for the residents and community.

Scope of Authority for Executive Director

The scope of the ED's authority and responsibilities should be written

- Job description
 - As an employee the ED must have a job description
- Formal delegation of authority (Board minutes)
- Policies and Procedures
- Goals and Standard Procedures
- ED's contract of employment

Write a Good Job Description

- Writing a job description for the executive director— The job description establishes the general areas of duty and responsibility for the person holding that position. It may also address the relationship of the ED and board, including prescribing required communications and reports.

Write a Good Job Description

- Duties
- Skills and competencies
- Relationships

Evaluating your Executive Director

- Characteristics of the evaluation process
- Developing performance standards
- Who should conduct the evaluation
- Collecting and summarizing the information
- Presenting the evaluation

Characteristics of the Evaluation Process*

- Ongoing
- Forward-looking
- Clarifying

* See *Evaluating Your Executive Director*, The Enterprise Foundation. Much of the information in this presentation references information from this valuable resource for nonprofits.

Characteristics of the Evaluation Process

- **Ongoing** – view it as continuous process. NOT one huge review at year's end. Periodic, low-key reviews. Review can look at overall performance, but often more effective if you focus on each performance objective separately.
 - Can set stage for larger year review at year's end. But that larger review should really largely be about future objectives. Not criticism of actions that occurred over previous year. Most of this should have been addressed in periodic reviews.

Characteristics of the Evaluation Process

- **Forward-looking** - guide the ED in performing on the job. Board should also help in planning how the organization's resources are invested to enhance the ED's professional capacity. While it looks back to determine the ED's strengths and challenges, it does so primarily to determine the proper approach to enhance future performance. In short, it is part of a continuous improvement process for the individual and the organization.

Characteristics of the Evaluation Process

- **Clarifying** – this is about communication. Positive, clarifying communication between the board and the executive director is critical.
 - ED must strive to understand board's expectations.
 - Board must understand and appreciate challenges faced by the ED and that person's skills and talents in addressing them.
 - Consideration to be given to adding resources when needed

Characteristics of the Evaluation Process

- **Periodic Reviews** – once a quarter often effective.
 - Regular, less formal, smaller reviews will help board and ED stay in contact.
 - Multiple low-key reviews help define expectations better.

Like Healthy Eating!

- Multiple healthy small meals - increase energy and positive outlook (easier said than done!!)



Developing Performance Standards

- Up to you!
- Articulate what you want. Must be consistent with organizational planning. Good resources to use:
 - Bylaws
 - Annual plan
 - Business plan
 - Good job description

Who Should Conduct the Evaluation?

- A board should conduct the evaluation but can rely on a committee to gather and report information to assist in the process.

Evaluation Form

- **Number ranking systems** – frequently used. But can be misleading, especially if more than one person providing input. If you decide to use number system, use small scale such as 1 – 4 instead of 1-10.

Evaluation Form

- **Stated expectations** – can be very effective way to evaluate. Did ED meet this expectation?
- For this to work, must have original, clear communications about job expectations.

Evaluation Form

- **Stated Expectations** (Example).
- State in declarative sentence.

“The executive director has worked with the board to develop a clear vision for the organization and understands his or her own leadership role.” _____

Comments:

Evaluation Form

- **Benefit of using declarative sentences**
 - Clearly defined.
 - Stated in same way you likely stated job description (as opposed to question).
 - Easy to comprehend. Declarative sentences most common in English language. We quickly gain a very clear understanding of what the sentence means – then can offer opinion and input. A more open-ended question can sometimes create ambiguity.

Evaluation Form

- **Open-ended questions** – use sparingly. Ok to place a couple at the end of a section. Common ones:
 - What are the ED's major strengths in this area?
 - What can ED do better in this area?
- Most of this information should already be covered in body of evaluation. These are residual, catch-all questions that may not even be necessary.

Evaluation Form*

- **Separate into different areas** – personnel management, strategic planning etc. Again, this should be consistent with the areas in job description.

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Dangers of Micromanagement!



Signs of Micromanagement*

- Resist delegating.
- Immersed in overseeing the projects of others.
- Start by correcting tiny details instead of looking at the big picture.
- Take back delegated work before it is finished if they find a mistake in it.
- Discourage others from making decisions without consulting them.

**See 10 Signs of Micromanagement – Strategies for Dealing With Micromanagers, Leadership Thoughts.*

Consequences of Micromanagement*

- Loss of trust
- Dependent employee or director
- Burnout
- High turnover
- Stop creativity

*See Jack Wallen, *6 big dangers of micromanagement*, Pluralsight.

How to Stop Micromanaging*

- Identify insecurities
- Hire the right people
- Learn to delegate effectively
- Let go of perfection
- Commit to group dynamic

*See Alyssa Gregory, *How to Stop Micromanaging Right Now*, The Balance.

Impact of Micromanagement in Board of Directors/ED Relationship

- Less competent managers will be attracted to ED position
- If every decision needs board review, organization/ED will suffer from:
 - less creativity
 - less critical thinking
 - less initiative
 - “please the board” mentality

Impact of Micromanagement on Evaluation²⁷ of Executive Director

- Harder to separate ED's duties from duties of board – they begin to merge.
- Risk unfair criticism and decreasing morale – micromanagement can subtly undermine nearly every duty performed by employee (or director)

Impact of Micromanagement on Evaluation²⁸ of Executive Director

- **Example** – Perhaps micromanaged ED will be evaluated on whether she/he “comes up with creative solutions to problems.” Nothing tends to undermine creativity more than micromanagement, so would not be fair to evaluate ED on creativity under these circumstances.

Micromanagement

- Don't Do It!
- If you tend to be a micromanager, frequent reviews will provide an outlet. But try to limit constructive criticism to these periodic reviews.

Takeaways

- Write a great job description!
- Multiple, small, low-key periodic reviews
- Communicate and positively reinforce job expectations at these review
- Listen – make sure you understand challenges faced by ED.

Questions?

Strasburger

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