## **Context**

The Executive Director’s performance review is a constructive process aimed at supporting their success and the organization’s growth. It should focus on recognizing accomplishments, identifying areas for development, and setting goals for the future. This review is not a disciplinary tool; serious performance or behavioral issues should be addressed as they arise, not deferred to the annual review. Likewise, it should not be used to revisit issues that have already been addressed and resolved according to organizational policies. A well-conducted performance review promotes transparency, continuous improvement, and a shared vision for the organization’s future.

## **Instructions**

This template is designed to be adapted to the specific job description or mandate of the Executive Director (ED). Reviewers should provide specific examples where possible and assess performance based on the organization’s goals and expectations. Use the rating scale below for each section.

**Rating Scale**

1 - Needs Improvement

* Performance does not meet expectations; significant improvement is required.

2 – Developing

* Performance is inconsistent or below expectations; improvement is needed in key areas.

3 - Meets Expectations

* Performance is solid and meets all key requirements effectively.

4 - Exceeds Expectations

* Performance is above standard; demonstrates strong competency and leadership.

5 – Outstanding

* Performance is exceptional, consistently surpassing expectations and driving organizational success.

**General Information**

Executive Director’s Name:

Reviewer’s name & role:

Review period:

Date of review:

**Leadership & Strategic Direction**

* Guides the organization in alignment with its mission and strategic plan.
* Demonstrates strong leadership, decision-making, and problem-solving skills.
* Encourages innovation and adaptability in response to challenges.

**Rating (1-5):**

**Comments & Examples:**

**Governance & Board Relations**

* Works effectively with the Board of Directors, providing clear and timely updates.
* Ensures the organization complies with legal and governance requirements.
* Supports Board development and engagement.

**Rating (1-5):**

**Comments & Examples:**

**Operational & Financial Management**

* Manages resources responsibly, ensuring financial sustainability.
* Oversees program and service delivery effectively.
* Implements policies and procedures to support efficient operations.

**Rating (1-5):**

**Comments & Examples:**

**Stakeholder & Community Engagement**

* Builds and maintains strong relationships with funders, partners, and community members.
* Represents the organization effectively in public and professional settings.
* Advocates for the organization’s mission and priorities.

**Rating (1-5):**

**Comments & Examples:**

**Fundraising & Resource Development**

* Identifies and secures funding opportunities to support the organization.
* Demonstrates effective grant writing and donor stewardship.
* Develops sustainable revenue-generation strategies.

**Rating (1-5):**

**Comments & Examples:**

**Team & Organizational Culture**

* Fosters a positive, inclusive, and collaborative work environment.
* Provides effective supervision, mentorship, and support for staff.
* Demonstrates a commitment to diversity, equity, and inclusion.

**Rating (1-5):**

**Comments & Examples:**

**Key Achievements & Areas for Growth**

* **Notable successes during this review period:**
* **Areas where improvement or development is needed:**

**Goals & Priorities for Next Review Period**

* **Key objectives for the next period:**
* **Support or resources needed to achieve these goals:**

**Overall Performance Score**

* **Total Score (sum of section ratings):**
* **Average Score (total score ÷ number of sections rated):**

**Signatures and Date**

**Reviewer’s Signature & Date:**

**Executive Director’s Signature & Date:**