## **Context**

The purpose of this self-evaluation is to encourage reflection on leadership, accomplishments, and challenges over the review period. This process helps align personal perspectives with organizational expectations and identifies areas for continued development. The self-evaluation should be an honest assessment, recognizing both strengths and opportunities for growth.

## **Instructions**

This self-evaluation template is designed to help the Executive Director (ED) reflect on their performance, achievements, and areas for growth. Responses should be specific and provide examples where possible. Use the rating scale below to assess performance in 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:

Review period:

Date of review:

**Leadership & Strategic Direction**

* How have you aligned the organization with its mission and strategic plan?
* What leadership decisions or strategies have been particularly effective this year?
* What challenges did you face in strategic planning, and how did you address them?

**Rating (1-5):**

**Self-Reflection & Examples:**

**Governance & Board Relations**

* How have you supported the Board of Directors in governance and decision-making?
* What strategies have you used to ensure compliance with governance requirements?
* How have you fostered Board development and engagement?

**Rating (1-5):**

**Self-Reflection & Examples:**

**Operational & Financial Management**

* How have you ensured financial sustainability and responsible resource management?
* What improvements have you made in program and service delivery?
* How have you strengthened operational policies and procedures?

**Rating (1-5):**

**Self-Reflection & Examples:**

**Stakeholder & Community Engagement**

* How have you built and maintained relationships with funders, partners, and community members?
* What advocacy efforts have you undertaken on behalf of the organization?
* How have you enhanced the organization’s visibility and reputation?

**Rating (1-5):**

**Self-Reflection & Examples:**

**Fundraising & Resource Development**

* What new funding opportunities have you identified and secured?
* How have you strengthened donor and grantor relationships?
* What strategies have you implemented for sustainable revenue generation?

**Rating (1-5):**

**Self-Reflection & Examples:**

**Team & Organizational Culture**

* How have you fostered a positive, inclusive, and collaborative work environment?
* What steps have you taken to support staff development and mentorship?
* How have you demonstrated a commitment to diversity, equity, and inclusion?

**Rating (1-5):**

**Self-Reflection & Examples:**

**Key Achievements & Areas for Growth**

* What were your most significant accomplishments during this review period?
* What challenges did you face, and how did you address them?
* What areas do you see as opportunities for growth and improvement?

**Goals & Priorities for Next Review Period**

* What key objectives do you want to focus on in the next period?
* What support or resources would help you achieve these goals?

**Overall Performance Score**

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

**Additional Comments**

**Additional comments:**

**Signature and Date**

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