**Performance Review for Executive Director**

**Survey Form for Board Members**

Period under review: example: July 2014 – June 2015

Period in which review took place:

OCA Executive Board Reviewers:

Each reviewer should forward a completed copy to Kara Kaelber, kkaelber@malone.edu

no later than .

An aggregated review will be signed by Kara Kaelber, 2015-2016 OCA President and discussed with Rachel O’Neill after the committee completes its review.

*Once a year, modify this form and use it to survey board members. Note that the form uses descriptive terms (such as "highly satisfied") rather than numerical ratings to help prevent potentially misleading averages.*

* Outstanding: Performance over a sustained period of time clearly and consistently exceeds expectations and is outstanding. Both results and how they are achieved are outstanding.
* Very good: Performance clearly meets and sometimes exceeds job requirements and significant contributions are made well beyond job demands.
* Fine: Solid and occasionally impressive performance.
* Improvement needed: Performance is frequently unsatisfactory
* I don't know.

*This form is meant to raise questions as well as obtain your feedback. If you think the board needs to know more about the organization's work in a given area before making an assessment, use the Comment section to raise the issue.*

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| **1. Overall organizational performance** |  |
| a. Works with the board and management staff to develop strategies for achieving mission, goals and financial viability. | **☐** Outst ☐ V Good ☐ Fine  ☐ Impr Needed ☐ Don't know |
| b. Appropriately provides both support and leadership to the board. | **☐** Outst ☐ V Good ☐ Fine  ☐ Impr Needed ☐ Don't know |
| c. Demonstrates quality of analysis and judgment related to progress and opportunities, and needs for changes.  | **☐** Outst ☐ V Good ☐ Fine  ☐ Impr Needed ☐ Don't know |
| d. Maintains and utilizes a working knowledge of significant developments and trends in the field  | **☐** Outst ☐ V Good ☐ Fine  ☐ Impr Needed ☐ Don't know |
| e. Builds respect and profile for the organization in its various constituencies. Supports the overall field/movement in which the organization works. | **☐** Outst ☐ V Good ☐ Fine  ☐ Impr Needed ☐ Don't know |
| f. Establishes ambitious goals for excellence and impact and initiates, maintains, and adapts programs with excellence and impact | **☐** Outst ☐ V Good ☐ Fine  ☐ Impr Needed ☐ Don't know |
| g. Comments on overall organizational performance: | **☐** Outst ☐ V Good ☐ Fine  ☐ Impr Needed ☐ Don't know |
| **2. Community leadership** |  |
| a. Serves as an effective spokesperson. Represents the organization well to its constituencies, including clients/members/patrons, other nonprofits, government agencies, elected officials, funders, and the general public | **☐** Outst ☐ V Good ☐ Fine  ☐ Impr Needed ☐ Don't know |
| b. Establishes and makes use of working relationships with organizations and individuals in the field. | **☐** Outst ☐ V Good ☐ Fine  ☐ Impr Needed ☐ Don't know |
| c. Sees that communication vehicles are developed and utilized well. | **☐** Outst ☐ V Good ☐ Fine  ☐ Impr Needed ☐ Don't know |

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| **3. Financial sustainability and mission impact** |  |
| a. Assures adequate control and accounting of all funds, including maintaining sound financial practices | **☐** Outst ☐ V Good ☐ Fine  ☐ Impr Needed ☐ Don't know |
| b. Sees that programs and activities are developed, executed, modified and dismantled to maximize mission impact  | **☐** Outst ☐ V Good ☐ Fine  ☐ Impr Needed ☐ Don't know |
| c. Works with the staff, finance committee and the board to prepare budgets, monitor progress, and initiate changes (to operations and/or to budgets) as appropriate | **☐** Outst ☐ V Good ☐ Fine  ☐ Impr Needed ☐ Don't know |
| d. Sees that official records and documents are retained; sees to compliance with federal state and local regulations (examples: Form 990, payroll withholding) | **☐** Outst ☐ V Good ☐ Fine  ☐ Impr Needed ☐ Don't know |
| e. Develops realistic, ambitious plans for acquiring funds | **☐** Outst ☐ V Good ☐ Fine  ☐ Impr Needed ☐ Don't know |
| f. Jointly with the president and secretary of the board, conducts official correspondence for the organization, and jointly with designated officers, executes legal documents appropriately | **☐** Outst ☐ V Good ☐ Fine  ☐ Impr Needed ☐ Don't know |
| g. Successfully involves others in fundraising and in earned income generation. | **☐** Outst ☐ V Good ☐ Fine  ☐ Impr Needed ☐ Don't know |
| h. Establishes positive relationships with institutional funders such as foundations, government agencies, churches, corporations, and so forth. | **☐** Outst ☐ V Good ☐ Fine  ☐ Impr Needed ☐ Don't know |
| i. Comments on financial sustainability and mission impact: | **☐** Outst ☐ V Good ☐ Fine ☐ Impr Needed ☐ Don't know |

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| **4. Board of directors** |  |
| a. With the board chair, appropriately involves | **☐** Outst ☐ V Good ☐ Fine  ☐ Impr Needed ☐ Don't know |
| b. Provides appropriate leadership to the board | **☐** Outst ☐ V Good ☐ Fine  ☐ Impr Needed ☐ Don't know |
| c. Sees that board members are kept fully informed in a timely way on the condition of the organization and important factors influencing it | **☐** Outst ☐ V Good ☐ Fine  ☐ Impr Needed ☐ Don't know |
| d. Sees that board committees are appropriately supported | **☐** Outst ☐ V Good ☐ Fine  ☐ Impr Needed ☐ Don't know |
| e. Works with the board officers to ensure that the board is effective as a body and that recruitment, involvement and departures of individual board members are effective | **☐** Outst ☐ V Good ☐ Fine  ☐ Impr Needed ☐ Don't know |
| f. Comments on the board: |  |

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| 6. Are there additional comments you would like to make that are not within the above categories? |