TREC TOGETHER RISING AS AN ENVIRONMENTAL COMMUNITY

Executive Director Performance Evaluation

Sample 360-Feedback Questionnaire

This is the 360-feedback questionnaire only – a formal evaluation summary form for the ED and Board to complete is in a separate document.

This sample is from the Panoramic Feedback 360 Tool – use the sample questions to customize and run your own ED evaluation in your favorite survey tool/program!

INSTRUCTIONS

This questionnaire will provide NAME, Executive Director of ORGANIZATION, and the ORGANIZATION Board of Directors with feedback from all staff and Board to help the Executive Director and the Board assess their performance and assist them in developing their capabilities fully.

It will require about *30 minutes* to complete.

To be most helpful to NAME, please answer the questions that follow candidly, without being unduly critical or uncritical. Please respond based on your personal experience of NAME.

Your individual reply is anonymous; numerical answers will be averaged with those of others into a report which provides a comprehensive but anonymous picture of how (NAME) is seen in the workplace. Your written comments will be combined with those from others. They won't be linked to your name. Since they will be provided verbatim, protect your anonymity by not writing in a recognizable style.

For your questionnaire to be complete, you must respond to all of the numerical questions. If you feel you don't have enough information to reply with some degree of confidence based on your own experience of NAME, please err on the side of choosing “NA” (Unsure/Do Not Know) versus guessing or making something up.

Only complete questionnaires will be counted. Be sure to complete the survey and select the number that that matches your opinion.

You do not have to complete your reply in one session: You can reply to part of the questionnaire, click the button to submit it, then return later to finish it.

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Please choose the appropriate rating for what most accurately reflects your perception and opinion of each statement regarding ORGANIZATION's Executive Director. Please use the ratings and comments to assess the ED's individual performance and responsibilities and not the organization as a whole (even though they are connected).

Survey Rating Scale

1 = Never 2= Rarely 3= Sometimes 4 = Most of the time 5 = Always
NA = Unsure/Do not know/Do not have enough information to rate

SAMPLE QUESTIONNAIRE

A. Performance toward ORGANIZATION's and Team Goals

Note: It may be helpful for responders to refresh their memory of the Strategic Plan (link if available) or campaign/team plans before doing the survey.

Each statement will receive a rating using the following scale:
1 = Never 2= Rarely 3= Sometimes 4 = Most of the time 5 = Always
NA = Unsure/Do not know/Do not have enough information to rate

1. To what extent did the ED visibly and effectively help staff or the Board keep in mind and use formal goals and plans (Strategic Plan, campaign plans, development department plans, etc.) during the year as a guiding tool for both themselves as ED and in guiding other staff or Board?

2. To what extent did the ED effectively juggle potentially conflicting or overwhelming/overly ambitious goals?
   Please provide examples if possible:

Please share any comments about your rating for the above items and be as specific as possible, including what the ED does well and should keep doing or could have been done differently. **COMMENTS:**

B. Goals and Achievements

Open-ended Comment Section:

1. What key achievements and strengths of the ED stand-out against some key organizational goals from the past year?
2. Are there any goal areas the ED has a role in advancing where a lack of progress/achievement stands out? What within the ED's control could they have done differently, if anything, so more progress could have been made?

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3. The ED would like feedback on internal priority goals in varying stages over the past year. Please provide any comments on what the ED did that worked well or is working well and what the ED could have done better, differently, or could do moving forward:

Examples:

a. Lead the organization through a transparent discussion and changes regarding staff salaries, living wages, and equitable pay for the work folks do.
b. Reconfigure ORGANIZATIONS staff/organization structure (e.g., separate out "External Relations," define mid-level management structure and roles) to provide greater coordination, efficiency, engagement, and a better understanding of expectations and roles.
c. Get solid board and staff participation and support for a new strategic plan.
d. Move ORGANIZATION forward to address Diversity, Equity, and Inclusion opportunities and issues.

C. Leadership Focus, Competencies, and Attributes

Please check the appropriate box, which most accurately reflects your perception/opinion of each statement regarding ORGANIZATION Executive Director. Please use the ratings and comments to assess the ED's individual performance and responsibilities and not the performance of the organization as a whole (even though they are connected).

Note: The list of competencies, attributes, and foci below should be tailored to reflect the expectations you have previously set in place with your ED. If your ED is unaware of a particular expectation, it is not helpful or fair to assess them against it. As you read through this list, you may find competencies and attributes that you would like your ED to focus on in the future. If that's the case, clarifying those expectations now as something that will be assessed against in future performance reviews support transparency and helps set the ED, the board, and the organization up for success.

Each statement will receive a rating using the following scale:

1 = Never 2= Rarely 3= Sometimes 4 = Most of the time 5 = Always

NA = Unsure/Do not know/Do not have enough information to rate

OVERALL LEADERSHIP

The Executive Director…

1. Leads in a way that inspires confidence and optimism.
2. Provides adequate and effective supervision and leadership for the Conservation Program Director, Development Director, and Director of Finance and Administration.
3. Serves as ORGANIZATION's cultural leader – setting a tone of authenticity, possibility, curiosity, equity, inclusion, and accountability in the organization's daily work.
4. Models the behaviors which are expected of their staff.
5. Shows genuine appreciation for honest feedback without taking challenges personally.
6. Shows empathy.

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7. Interacts with others respectfully.
8. Is motivated to learn, even from mistakes.
9. Is honest and straightforward.
10. Protects the reputation of the organization and colleagues.
11. Can be trusted to do what they say they will do.
12. Effectively manages time and priorities.
13. Demonstrates authenticity, creativity, and flexibility in challenging situations.
14. Exhibits willingness to take tough stands when necessary.
15. Works effectively with the Board of Directors.
16. Has become an increasingly effective leader.

Please share any comments about your rating for the above items and be as specific as possible, including what the ED does well and should keep doing or could have been done differently. **COMMENTS:**

FOSTERING AN INCLUSIVE WORKPLACE

The Executive Director...

1. Treats people respectfully and fairly, regardless of race, ethnicity, religion, residency status, gender, sexual orientation, rank, age, ability, or personal relationship.
2. Acknowledges that they may have conscious or unconscious biases and works to uncover their conscious and unconscious biases and address them.
3. Actively addresses and interrupts statements that contain or reveal a bias around a certain identity or identities.
4. Ensures that staff can discuss difficult topics without fear of retribution.
5. Names and manages responsibly the power that accompanies their rank. (For example, recognizing that casual suggestions made by an ED can feel like demands, not suggestions, and that comments and feedback across a power differential are inherently loaded with power.)
6. Shows appreciation for everyone's contributions.
7. Makes decisions that show respect for the perspectives and needs of all groups involved in and impacted by the organization's work.
8. Plays a visible leadership role to advance initiatives that focus on diversity, equity, and inclusion policies and practices in the organization.

Please share any comments about your rating for the above items and be as specific as possible, including what the ED does well and should keep doing or could have been done differently. **COMMENTS:**

STRATEGIC FOCUS and ORGANIZATIONAL SUSTAINABILITY

The Executive Director...

1. Effectively communicates the organization's mission, vision, and strategy internally and externally.
2. Supports program staff as appropriate in the cultivation and maintenance of relationships with state and federal elected officials, as well as conservation, business, and cultural leaders.

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3. Supports development staff, as appropriate, in cultivation of donor relationships.
4. Ensures evaluation of ORGANIZATION's impact and identifies opportunities to address issues or opportunities to improve.
5. Effectively delegates appropriate objectives and tasks to others.
6. Ensures that financial and other resources are managed effectively.
7. Ensures programs and campaigns are adequately resourced.
8. Supports colleagues' needs to balance work with other commitments.

Please share any comments about your rating for the above items and be as specific as possible, including what the ED does well and should keep doing or could have been done differently. **COMMENTS:**

ACHIEVING RESULTS BY WORKING WITH AND DEVELOPING STAFF

The Executive Director...

1. Supports setting challenging yet attainable staff performance objectives.
2. Devotes adequate time and energy to helping and coaching others.
   (Please answer "N/A" unless you report directly to the ED.)
3. Gives useful and accurate performance feedback.
   (Please answer "N/A" unless you report directly to the ED.)
4. Effectively recognizes the accomplishments and contributions of others.
5. Provides clear decisions in a timely manner.
6. Clarifies staff's decision-making authority.
7. Respects the opinions and needs of others.

Please share any comments about your rating for the above items and be as specific as possible, including what the ED does well and should keep doing or could have been done differently. **COMMENTS:**

Summary Comments Section:

What are NAME's three (3) greatest strengths as a leader?

What are NAME's most significant challenges or development opportunities as a leader?

What other suggestions do you have to help NAME succeed in their role?

Is there anything else you would like NAME to know about your view of their leadership?

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