

Best Practices for Executive Performance Evaluations*

1. A written Assessment should take place annually.
2. A less formal mid-year review/discussion should occur.
3. Review process should include a self-review and a board review.
4. All board members should provide feedback which will be synthesized and summarized by board chair or ad hoc evaluation committee and presented to board for review. Once the written evaluation is complete and has been discussed with Executive, a copy of the written review, with relevant notes, should be submitted to Trustee (FM).
5. Four general areas should be evaluated.
 - A. Annual Performance Goals
 - B. Core Competencies for Chief Executives
 - a. Strategic Thinking and Planning
 - b. Administration
 - c. Board Relations
 - d. Financial Management
 - e. Communications and Public Relations
 - f. Fundraising
 - C. Personal Leadership Qualities
 - a. Leadership Skills
 - b. Interpersonal Skills
 - c. Application of Franciscan Values in decision-making and in interpersonal relationships
 - D. Accomplishments and Challenges
 - a. Assessing the past year
 - b. Planning for the future

*Summarized from Board Source a globally recognized nonprofit focused on strengthening nonprofit leadership at the highest level—the board of directors.

SAMPLE Performance Evaluation Template – Ministry Executive

GOALS

How did the Executive perform on the following goals:

(List the goals set by the board for the performance period) Goals can be evaluated on a scale, 1-5 or with a narrative. Whichever method is used specific metrics and examples should be included in the comments.

In our case, Developing, maintaining, and deepening a Franciscan culture is the #1 responsibility of the board and the ED. This should be the first goal and should have a much higher weighting than other goals.

CORE COMPETENCIES

Effective Executives possess the following core competencies. Comment on your CEO's competency in these areas. If improvement is required, be clear about the observable behavior or evidence the board is looking for to demonstrate competency.

- a. Strategic Thinking and Planning
- b. Administration
- c. Board Relations
- d. Financial Management
- e. Internal and External Communications
- f. Fundraising

LEADERSHIP QUALITIES

Effective Executives of a Franciscan ministry exhibit leadership qualities that reflect Franciscan values. Comment on your CEO's leadership qualities in these areas. If improvement is required, be clear about the observable behavior or evidence the board is looking for to demonstrate effective leadership.

- a. Leadership Skills – Is Executive Director relationship oriented? Does s/he practice subsidiarity and synodality? Does s/he consistently exercise good judgement? Is s/he influential without being manipulative? Does s/he act as a mentor and provide staff with professional and spiritual development opportunities? Is s/he open to input and criticism from the board? From staff? Does s/he recognize that their ministry is one component of a larger community of ministries?
- b. Interpersonal Skills – Does the Executive have strong emotional intelligence? Are they a good listener and empathetic? Are they good communicators to board and staff? Do they set appropriate boundaries? Have they developed supportive external relationships with donors and community stakeholders?
- c. Franciscan Values – Does the Executive have a clear understanding of their role, of Franciscan values and the Characteristics of a Franciscan Ministry. Do they

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refer to these values when discussing the leadership team’s decision-making. Does s/he hold himself and the board accountable to applying Franciscan Values to board decision-making and interpersonal relationships. Does a Franciscan culture permeate the ministry.

ACCOMPLISHMENTS & FUTURE PLANNING

- a. What are the Executive’s key accomplishments over the past year. What obstacle were overcome? What opportunities were leveraged?

- b. Set goals for the coming year. What obstacles will have to be overcome? What opportunities can be leveraged?