

Performance Review for Executive Director Survey Form for Board Members

Executive Director's Name _____ Job Title _____
 Period Covered _____ to _____ Date of Evaluation _____
 Name of Evaluator _____ Self Evaluation: _____ Yes

This form is designed to allow the board member to evaluate the Executive Director's performance over the specified period. The following categories are used to rank the Executive Director's performance.

- 5 **Distinguished**: Performance levels and accomplishments far exceed normal expectations. This category is reserved for performance that stands out and clearly and consistently demonstrates exceptional accomplishments in terms of quality and quantity of work that is easily recognized as truly exceptional by others.
 - 4 **Exceeds Expectations**: Performance frequently exceeds job requirements. Performance is sustained and uniformly high with thorough and on-time results.
 - 3 **Meets Expectations**: Performance clearly and fully meets all the requirements of the position in terms of quality and quantity of work. It is described as solid performance. Minor deviations may occur, the overall level of performance meets or slightly exceeds all position requirements.
 - 2 **Development Needed**: Performance is less than expected OR this is a new skill that needs to be developed or enhanced.
 - 1 **Significant Concerns**: Performance must improve significantly within a reasonable period if the individual is to remain in this position.
- √ **Not Rated**

Administrative Performance	Not Rated (√)	Significant Concerns (1)	Development Needed (2)	Meets Expectations (3)	Exceeds Expectations (4)	Distinguished (5)
1. Selects, employs, and evaluates instructional, administrative and support staff.						
2. Develops and implements the organizational systems to recruit, interview, assign, orient, and train instructional employees and volunteer program participants.						
3. Develops and implements effective policies as it relates to TABE and HiSET test security.						
4. Develops and implements effective policies related to student conduct and instructional competency.						
5. Develops and implements effective strategies for staff development to improve instructional performance and implement educational best practices.						
6. Develops new programs that benefit students as they strive to overcome barriers to attending class regularly.						

Instructional Leadership	Not Rated (√)	Significant Concerns (1)	Development Needed (2)	Meets Expectations (3)	Exceeds Expectations (4)	Distinguished (5)
1. Effectively develops and maintains student curriculum for instructors to implement in their classroom instruction.						
2. Assists/answers questions for students working on online learning.						
3. Assists staff in conducting intake, orientation, pre and post-testing for students.						
4. Substitutes for night Lafayette HiSET/ESL classes as needed.						
5. Effectively organizes, recruits and assist staff in all HiSET nights in our local communities in Lafayette and St. Landry Parishes.						
6. Effectively administers career counseling for students exiting VITA programs.						

Professional Duties and Responsibilities	Not Rated (√)	Significant Concerns (1)	Development Needed (2)	Meets Expectations (3)	Exceeds Expectations (4)	Distinguished (5)
1. Effectively organizes, administers, and develops all programs of VITA.						
2. Assumes responsibility for developing and administering all applicable policies.						
3. Assumes responsibility for supervision and evaluation of all staff.						
4. Responsible for attending monthly meetings, trainings, and conferences as a WIOA (Workforce Innovation Opportunity Act) Board Member.						

Financial Management	Not Rated (√)	Significant Concerns (1)	Development Needed (2)	Meets Expectations (3)	Exceeds Expectations (4)	Distinguished (5)
1. Assures adequate control and accounting of all funds, including maintaining sound financial practices.						
2. Manages the organization's budget and fund development activities.						
3. 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.						
4. Sees that official records and documents are retained.						
5. Effectively monitors record keeping procedures to document student activities and educational progress in compliance with reporting requirements.						
6. Effectively develops and maintains a financial management system, including the monitoring of expenditures and reimbursements.						

***Executive Board authorized by full board action on May 18,2022 to consult with auditors to assist in completing Financial Management portion of *Performance Review for Executive Director Survey Form* including assessment of segregation of financial duties.**

Board of Directors/Executive Director Interactions	Not Rated (√)	Significant Concerns (1)	Development Needed (2)	Meets Expectations (3)	Exceeds Expectations (4)	Distinguished (5)
1. With the board chair, appropriately involves board members in decisions.						
2. Provides appropriate leadership to the board regarding human, material, and financial matters.						
3. Sees that board committees are appropriately supported.						
4. Sees that board members are kept fully informed on the condition of the organization and important factors influencing it.						
5. 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.						

Adopted: May 18, 2022