

TREASURE COAST REGIONAL PLANNING COUNCIL

MEMORANDUM

To: Council Members

AGENDA ITEM 10C

From: Budget/Personnel Committee

Date: December 11, 2015 Council Meeting

Subject: Annual Review of Council's Executive Director

Introduction

It is Council's policy to provide a performance evaluation of the Executive Director at the December Council meeting each year. The Budget/Personnel Committee is charged with undertaking the evaluation and providing a recommendation for consideration of the entire Council. The Committee met on November 30, 2015 to perform an evaluation of Council's Executive Director.

Background

On October 16, 2015, Council members were provided with a survey form for the purpose of evaluating the performance of the Executive Director. Nine forms were returned to Council offices (attached). The survey will also be used by the Executive Director to gain a sense of what changes might be made to improve the organization and achieve its goals and mission.

At last year's annual review of the Executive Director, the Committee's recommendation was to approve the continuation of employment of the Executive Director with a four percent merit increase for both the Executive Director and staff. The merit increase took effect on January 1, 2015.

Conclusion

The Budget/Personnel Committee conducted its evaluation and is recommending the continued employment of the Executive Director along with a three percent merit increase for the Executive Director and staff. The effective date of the increase is recommended to be January 1, 2016.

Recommendation

Council should approve the Budget/Personnel Committee's recommendation to continue the employment of the Executive Director and approve a three percent merit increase for both the Executive Director and staff, with the increase becoming effective January 1, 2016.

Attachments

TREASURE COAST REGIONAL
PLANNING COUNCIL

ASSESSMENT OF THE
EXECUTIVE DIRECTOR

How to Complete the Questionnaire

This questionnaire is designed to help you, your board colleagues, and the Executive Director assess the Executive Director’s performance. It should take you 30 to 60 minutes to complete. To encourage candor, the questionnaire does not ask for your name. Your confidential responses, along with the responses of your colleagues, will be summarized and shared with the Executive Director at a meeting with a small committee of the board.

Each section begins with a brief description of an important area of responsibility. Please read it and then answer the questions that follow. The questions measure your level of satisfaction with how the Executive Director is carrying out various aspects of each responsibility. Check off the number representing the degree to which you are satisfied or not satisfied with the Executive Director’s performance in each responsibility mentioned. The answer you mark can range on a scale of 1 to 4, with 1 representing “Very dissatisfied” and 4 representing “Very satisfied.”

- 1 Very Dissatisfied
- 2 Dissatisfied
- 3 Satisfied
- 4 Very Satisfied

1. Vision, Mission, and Strategies*

The Executive Director’s role has both strategic and operational components. Working with the board, the Executive Director must develop a shared vision for the future of the organization, building understanding around the current mission, and develop appropriate goals and strategies to advance that mission.

How satisfied are you that:	Not satisfied		Satisfied		Not Sure
1-1 The Executive Director has worked with the board to develop a clear vision for the organization and understands his or her own leadership role?	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 X	4 <input type="checkbox"/>	N/S <input type="checkbox"/>
1-2 The Executive Director has a sense of what must change and what must remain the same in order to accomplish the organization’s mission and realize its vision?	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 X	4 <input type="checkbox"/>	N/S <input type="checkbox"/>

*The Strategic Regional Policy Plan and its implementation is Council’s Long-range vision/plan.

2. Accomplishment of Management Objectives

Working with the board, the Executive Director establishes operational objectives that support the strategic plan. The Executive Director is responsible for leading the staff in the implementation of the strategic plan and any annual plans.

How satisfied are you that:	Not satisfied		Satisfied		Not Sure
2-1 The Executive Director selects and cultivates qualified senior staff, models effective behaviors and skills, and builds morale among staff and volunteers?	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 X	NS <input type="checkbox"/>

3. Program Management

Treasure Coast Regional Planning Council carries out its mission by offering specific programs and services. The Executive Director leads the staff in managing and administering these programs and services. This requires a thorough knowledge of the organization's mission areas as well as an understanding of technical, operational, and ethical issues.

How satisfied are you that:	Not satisfied		Satisfied		Not Sure
3-1 The Executive Director demonstrates substantive knowledge regarding the organization's programs and services?	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 X	NS <input type="checkbox"/>
3-2 The Executive Director, through effective oversight and staffing, sets high standards of high quality for the organization's programs?	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 X	NS <input type="checkbox"/>

4. Effectiveness in Fund Raising and Resource Development

The Executive Director, partnership with the board and appropriate staff, is responsible for developing and implementing appropriate financial development strategies. The Executive Director and board use their combined strengths, knowledge, and relationships to help the organization achieve its objectives.

How satisfied are you that:	Not satisfied		Satisfied		Not Sure
4-1 The Executive Director has a clear understanding of the current and future financial resources needed to realize the organization's mission?	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 X	NS <input type="checkbox"/>
4-2 The Executive Director is effective and works well with staff, board members, and legislature to secure adequate funding commitments for the organization?	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 X	NS <input type="checkbox"/>

5. Fiscal Management

Ensuring that income is managed wisely is especially important for a nonprofit organization operating in the public trust. It is the role of the Executive Director to see that solid planning and budgeting systems are in place and that the organization's goals and strategic plan serve as the basis for sound financial planning. In addition, it is the Executive Director's responsibility to ensure that qualified staff are hired to accurately monitor, assess, and manage the financial health of the nonprofit.

How satisfied are you that:	Not satisfied		Satisfied		Not Sure
5-1 The Executive Director is knowledgeable regarding planning and budget management of the organization?	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 X	NS <input type="checkbox"/>
5-2 The Executive Director presents financial reports to the board on a regular basis and submits an annual budget for board review, revision, and approval?	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 X	NS <input type="checkbox"/>

6. Operations Management

The Executive Director is responsible for day-to-day management. The Executive Director works with staff to develop, maintain, and use the systems and resources that facilitate the effective operation of the organization.

How satisfied are you that:	Not satisfied		Satisfied		Not Sure
6-1 The Executive Director is knowledgeable regarding the operation of an effective office environment?	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 X	NS <input type="checkbox"/>
6-2 The Executive Director ensures compliance with all legal and regulatory requirements?	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 X	NS <input type="checkbox"/>

7. The Executive Director/Board Partnership

The Executive Director and the board must work together as partners. Each arm of leadership draws upon its own unique strengths and abilities. The Executive Director and the board have joint responsibility for developing and maintaining a strong working relationship and a system for sharing information. The board is responsible for creating a written job description for the Executive Director that is clear and agreed to by all parties.

How satisfied are you that:	Not satisfied		Satisfied		Not Sure
7-1 The Executive Director and the board are clear about the differences between their respective roles?	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 X	NS <input type="checkbox"/>
7-2 The Executive Director is treated as a respected professional by members of the board?	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 X	NS <input type="checkbox"/>
7-3 The Executive Director has been delegated the authority necessary to manage the organization effectively?	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 X	NS <input type="checkbox"/>
7-4 The Executive Director raises issues and questions and provides adequate information to inform board discussions?	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 X	NS <input type="checkbox"/>
7-5 The Executive Director receives the annual review to which he or she is entitled in a timely and thoughtful way that articulates specific strengths and areas for improvement?	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 X	NS <input type="checkbox"/>

8. The Board/Staff Relationship

Because many organizational issues require a partnership of board and staff to be addressed effectively, the Executive Director should work to create opportunities for senior staff to interact with board members and to ensure that board and staff have a good working relationship.

How satisfied are you that:	Not satisfied		Satisfied		Not Sure
8-1 The Executive Director has established appropriate systems for dialogue and communication between the board and staff to ensure that the board maintains a good knowledge of the organization?	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 X	NS
8-2 The Executive Director and senior staff have built effective working relationships with the officers of the board and committee chairs who are responsible for specific aspects of organizations governance?	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 X	NS <input type="checkbox"/>
8-3 The working relationships among the Executive Director, staff, and board are collegial?	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 X	NS <input type="checkbox"/>

9. External Liaison and Public Image

The Executive Director and board members are key players in establishing and maintaining positive relationships with the many groups that support the work of the nonprofit.

How satisfied are you that:	Not satisfied		Satisfied		Not Sure
9-1 The Executive Director maintains a positive professional reputation in the local community and is a good ambassador?	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 X	NS <input type="checkbox"/>
9-2 The Executive Director is an articulate and knowledgeable spokesperson?	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 X	NS <input type="checkbox"/>
9-3 The Executive Director is well regarded by his or her professional peers in the organization's area of focus?	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 X	NS <input type="checkbox"/>

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How would you rate:	Not satisfied		Satisfied		Not Sure
	1	2	3	4	NS
a. Administration and Operations	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	X	<input type="checkbox"/>
b. Program Development and Delivery	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	X	<input type="checkbox"/>
c. Financial Management	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	X	<input type="checkbox"/>
d. Education	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	X	<input type="checkbox"/>
e. Long-Range and Strategic Planning	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	X	<input type="checkbox"/>
f. Client Services	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	X	<input type="checkbox"/>
g. Overall Quality of Staff Performance	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	X	<input type="checkbox"/>

Open-Ending Questions

1. What are the three major strengths of the Executive Director?

Articulate, authentic and committed.

2. What are some limitations in the Executive Director's performance?

Probably limited by Florida State constraints and Counties interactions, TCRPC has a distinctly holistic perspective, but less regional impact than it should.

3. What have been the most significant achievements of the Executive Director over the last year?

Education initiatives for Council Members...excellent backdrop for considering regional issues.

4. What are areas in which the board could provide better support to the Executive Director?

Possibly working with Tallahassee to increase TCRPC impact.

5. Additional Comments:

What can municipal members of TCRPC do to make the Council more impactful?

RECEIVED
Reviewer 2

NOV 02 2015

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REGIONAL PLANNING COUNCIL

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7-3 The Executive Director has been delegated the authority necessary to manage the organization effectively?	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input checked="" type="checkbox"/>	NS <input type="checkbox"/>
7-4 The Executive Director raises issues and questions and provides adequate information to inform board discussions?	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input checked="" type="checkbox"/>	NS <input type="checkbox"/>
7-5 The Executive Director receives the annual review to which he or she is entitled in a timely and thoughtful way that articulates specific strengths and areas for improvement?	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input checked="" type="checkbox"/>	NS <input type="checkbox"/>

8. The Board/Staff Relationship

Because many organizational issues require a partnership of board and staff to be addressed effectively, the Executive Director should work to create opportunities for senior staff to interact with board members and to ensure that board and staff have a good working relationship.

How satisfied are you that:	Not satisfied		Satisfied		Not Sure
8-1 The Executive Director has established appropriate systems for dialogue and communication between the board and staff to ensure that the board maintains a good knowledge of the organization?	1	2	3	4	NS
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
8-2 The Executive Director and senior staff have built effective working relationships with the officers of the board and committee chairs who are responsible for specific aspects of organizations governance?	1	2	3	4	NS
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
8-3 The working relationships among the Executive Director, staff, and board are collegial?	1	2	3	4	NS
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

9. External Liaison and Public Image

The Executive Director and board members are key players in establishing and maintaining positive relationships with the many groups that support the work of the nonprofit.

How satisfied are you that:	Not satisfied		Satisfied		Not Sure
9-1 The Executive Director maintains a positive professional reputation in the local community and is a good ambassador?	1	2	3	4	NS
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
9-2 The Executive Director is an articulate and knowledgeable spokesperson?	1	2	3	4	NS
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
9-3 The Executive Director is well regarded by his or her professional peers in the organization's area of focus?	1	2	3	4	NS
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

10. Board Perceptions of the Organization

As the board reviews the performance of the Executive Director, it should also gauge its perceptions of the general operations and quality of the organization in the following areas. The responses to these questions may help to focus the board and the Executive Director's attention on specific areas of organizational strength and limitations and will help to guide future organizational development efforts.

How would you rate:	Not satisfied		Satisfied		Not Sure
	1	2	3	4	
a. Administration and Operations	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
b. Program Development and Delivery	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
c. Financial Management	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
d. Education	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
e. Long-Range and Strategic Planning	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
f. Client Services	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
g. Overall Quality of Staff Performance	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Open-Ending Questions

1. What are the three major strengths of the Executive Director?

- ☐ He clearly loves his profession.
- ☐ He is thoughtful & goes ~~above~~ & beyond to communicate & address issues with board members
- ☐ He is well connected & liked.

2. What are some limitations in the Executive Director's performance?

Sometimes he has a tendency to smile. ☺

3. What have been the most significant achievements of the Executive Director over the last year?

- ☐ Was an effective leader in the challenge against Breaking apart the TC RPC.
- ☐ Effectively worked on legislative items regarding state funding & RPC's.

4. What are areas in which the board could provide better support to the Executive Director?

Communications.

5. Additional Comments:

TREASURE COAST REGIONAL
PLANNING COUNCIL

ASSESSMENT OF THE
EXECUTIVE DIRECTOR

How to Complete the Questionnaire

This questionnaire is designed to help you, your board colleagues, and the Executive Director assess the Executive Director's performance. It should take you 30 to 60 minutes to complete. To encourage candor, the questionnaire does not ask for your name. Your confidential responses, along with the responses of your colleagues, will be summarized and shared with the Executive Director at a meeting with a small committee of the board.

Each section begins with a brief description of an important area of responsibility. Please read it and then answer the questions that follow. The questions measure your level of satisfaction with how the Executive Director is carrying out various aspects of each responsibility. Check off the number representing the degree to which you are satisfied or not satisfied with the Executive Director's performance in each responsibility mentioned. The answer you mark can range on a scale of 1 to 4, with 1 representing "Very dissatisfied" and 4 representing "Very satisfied."

- 1 Very Dissatisfied
- 2 Dissatisfied
- 3 Satisfied
- 4 Very Satisfied

1. Vision, Mission, and Strategies*

The Executive Director's role has both strategic and operational components. Working with the board, the Executive Director must develop a shared vision for the future of the organization, building understanding around the current mission, and develop appropriate goals and strategies to advance that mission.

How satisfied are you that:	Not satisfied		Satisfied		Not Sure
1-1 The Executive Director has worked with the board to develop a clear vision for the organization and understands his or her own leadership role?	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input checked="" type="checkbox"/>	N/S <input type="checkbox"/>
1-2 The Executive Director has a sense of what must change and what must remain the same in order to accomplish the organization's mission and realize its vision?	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input checked="" type="checkbox"/>	N/S <input type="checkbox"/>

*The Strategic Regional Policy Plan and its implementation is Council's Long-range vision/plan.

2. Accomplishment of Management Objectives

Working with the board, the Executive Director establishes operational objectives that support the strategic plan. The Executive Director is responsible for leading the staff in the implementation of the strategic plan and any annual plans.

How satisfied are you that:	Not satisfied		Satisfied		Not Sure
2-1 The Executive Director selects and cultivates qualified senior staff, models effective behaviors and skills, and builds morale among staff and volunteers?	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input checked="" type="checkbox"/>	NS <input type="checkbox"/>

3. Program Management

Treasure Coast Regional Planning Council carries out its mission by offering specific programs and services. The Executive Director leads the staff in managing and administering these programs and services. This requires a thorough knowledge of the organization's mission areas as well as an understanding of technical, operational, and ethical issues.

How satisfied are you that:	Not satisfied		Satisfied		Not Sure
3-1 The Executive Director demonstrates substantive knowledge regarding the organization's programs and services?	1	2	3	4	NS
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
3-2 The Executive Director, through effective oversight and staffing, sets high standards of high quality for the organization's programs?	1	2	3	4	NS
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

4. Effectiveness in Fund Raising and Resource Development

The Executive Director, partnership with the board and appropriate staff, is responsible for developing and implementing appropriate financial development strategies. The Executive Director and board use their combined strengths, knowledge, and relationships to help the organization achieve its objectives.

How satisfied are you that:	Not satisfied		Satisfied		Not Sure
4-1 The Executive Director has a clear understanding of the current and future financial resources needed to realize the organization's mission?	1	2	3	4	NS
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
4-2 The Executive Director is effective and works well with staff, board members, and legislature to secure adequate funding commitments for the organization?	1	2	3	4	NS
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

5. Fiscal Management

Ensuring that income is managed wisely is especially important for a nonprofit organization operating in the public trust. It is the role of the Executive Director to see that solid planning and budgeting systems are in place and that the organization's goals and strategic plan serve as the basis for sound financial planning. In addition, it is the Executive Director's responsibility to ensure that qualified staff are hired to accurately monitor, assess, and manage the financial health of the nonprofit.

How satisfied are you that:	Not satisfied		Satisfied		Not Sure
5-1 The Executive Director is knowledgeable regarding planning and budget management of the organization?	1	2	3	4	NS
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
5-2 The Executive Director presents financial reports to the board on a regular basis and submits an annual budget for board review, revision, and approval?	1	2	3	4	NS
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

6. Operations Management

The Executive Director is responsible for day-to-day management. The Executive Director works with staff to develop, maintain, and use the systems and resources that facilitate the effective operation of the organization.

How satisfied are you that:	Not satisfied		Satisfied		Not Sure
6-1 The Executive Director is knowledgeable regarding the operation of an effective office environment?	1	2	3	4	NS
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
6-2 The Executive Director ensures compliance with all legal and regulatory requirements?	1	2	3	4	NS
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

7. The Executive Director/Board Partnership

The Executive Director and the board must work together as partners. Each arm of leadership draws upon its own unique strengths and abilities. The Executive Director and the board have joint responsibility for developing and maintaining a strong working relationship and a system for sharing information. The board is responsible for creating a written job description for the Executive Director that is clear and agreed to by all parties.

How satisfied are you that:	Not satisfied		Satisfied		Not Sure
7-1 The Executive Director and the board are clear about the differences between their respective roles?	1	2	3	4	NS
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
7-2 The Executive Director is treated as a respected professional by members of the board?	1	2	3	4	NS
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
7-3 The Executive Director has been delegated the authority necessary to manage the organization effectively?	1	2	3	4	NS
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
7-4 The Executive Director raises issues and questions and provides adequate information to inform board discussions?	1	2	3	4	NS
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
7-5 The Executive Director receives the annual review to which he or she is entitled in a timely and thoughtful way that articulates specific strengths and areas for improvement?	1	2	3	4	NS
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

8. The Board/Staff Relationship

Because many organizational issues require a partnership of board and staff to be addressed effectively, the Executive Director should work to create opportunities for senior staff to interact with board members and to ensure that board and staff have a good working relationship.

How satisfied are you that:	Not satisfied		Satisfied		Not Sure
8-1 The Executive Director has established appropriate systems for dialogue and communication between the board and staff to ensure that the board maintains a good knowledge of the organization?	1	2	3	4	NS
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
8-2 The Executive Director and senior staff have built effective working relationships with the officers of the board and committee chairs who are responsible for specific aspects of organizations governance?	1	2	3	4	NS
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
8-3 The working relationships among the Executive Director, staff, and board are collegial?	1	2	3	4	NS
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

9. External Liaison and Public Image

The Executive Director and board members are key players in establishing and maintaining positive relationships with the many groups that support the work of the nonprofit.

How satisfied are you that:	Not satisfied		Satisfied		Not Sure
9-1 The Executive Director maintains a positive professional reputation in the local community and is a good ambassador?	1	2	3	4	NS
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
9-2 The Executive Director is an articulate and knowledgeable spokesperson?	1	2	3	4	NS
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
9-3 The Executive Director is well regarded by his or her professional peers in the organization's area of focus?	1	2	3	4	NS
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

10. Board Perceptions of the Organization

As the board reviews the performance of the Executive Director, it should also gauge its perceptions of the general operations and quality of the organization in the following areas. The responses to these questions may help to focus the board and the Executive Director's attention on specific areas of organizational strength and limitations and will help to guide future organizational development efforts.

How would you rate:	Not satisfied		Satisfied		Not Sure
	1	2	3	4	NS
a. Administration and Operations	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
b. Program Development and Delivery	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
c. Financial Management	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
d. Education	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
e. Long-Range and Strategic Planning	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
f. Client Services	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
g. Overall Quality of Staff Performance	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Open-Ending Questions

1. What are the three major strengths of the Executive Director?

Mike is a people person and is a stand-up guy. Too many people have lost that quality. Not Mike.

2. What are some limitations in the Executive Director's performance?

His Board at times limits his horizons. The council needs more real business type that employ the skills of the former. Inst.

3. What have been the most significant achievements of the Executive Director over the last year?

Keeping the Political climate steady and the support growing for the Council.

4. What are areas in which the board could provide better support to the Executive Director?

Stay focused on big regional projects that have a significant impact on the quality of life.

5. Additional Comments:

REGIONAL PLANNING COUNCIL

ASSESSMENT OF THE
EXECUTIVE DIRECTOR

How to Complete the Questionnaire

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- 1 **Very Dissatisfied**
- 2 **Dissatisfied**
- 3 **Satisfied**
- 4 **Very Satisfied**

1. Vision, Mission, and Strategies*

The Executive Director's role has both strategic and operational components. Working with the board, the Executive Director must develop a shared vision for the future of the organization, building understanding around the current mission, and develop appropriate goals and strategies to advance that mission.

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1-1 The Executive Director has worked with the board to develop a clear vision for the organization and understands his or her own leadership role?	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input checked="" type="checkbox"/>	N/S <input type="checkbox"/>
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How satisfied are you that:	Not satisfied		Satisfied		Not Sure
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How satisfied are you that:	Not satisfied		Satisfied		Not Sure
3-1 The Executive Director demonstrates substantive knowledge regarding the organization's programs and services?	1	2	3	4	NS
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
3-2 The Executive Director, through effective oversight and staffing, sets high standards of high quality for the organization's programs?	1	2	3	4	NS
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5-1 The Executive Director is knowledgeable regarding planning and budget management of the organization?	1	2	3	4	NS
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
5-2 The Executive Director presents financial reports to the board on a regular basis and submits an annual budget for board review, revision, and approval?	1	2	3	4	NS
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

6. Operations Management

The Executive Director is responsible for day-to-day management. The Executive Director works with staff to develop, maintain, and use the systems and resources that facilitate the effective operation of the organization.

How satisfied are you that:	Not satisfied		Satisfied		Not Sure
6-1 The Executive Director is knowledgeable regarding the operation of an effective office environment?	1	2	3	4	NS
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
6-2 The Executive Director ensures compliance with all legal and regulatory requirements?	1	2	3	4	NS
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

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How satisfied are you that:	Not satisfied		Satisfied		Not Sure
7-1 The Executive Director and the board are clear about the differences between their respective roles?	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input checked="" type="checkbox"/>	NS <input type="checkbox"/>
7-2 The Executive Director is treated as a respected professional by members of the board?	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input checked="" type="checkbox"/>	NS <input type="checkbox"/>
7-3 The Executive Director has been delegated the authority necessary to manage the organization effectively?	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input checked="" type="checkbox"/>	NS <input type="checkbox"/>
7-4 The Executive Director raises issues and questions and provides adequate information to inform board discussions?	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input checked="" type="checkbox"/>	NS <input type="checkbox"/>
7-5 The Executive Director receives the annual review to which he or she is entitled in a timely and thoughtful way that articulates specific strengths and areas for improvement?	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input checked="" type="checkbox"/>	NS <input type="checkbox"/>

8. The Board/Staff Relationship

Because many organizational issues require a partnership of board and staff to be addressed effectively, the Executive Director should work to create opportunities for senior staff to interact with board members and to ensure that board and staff have a good working relationship.

How satisfied are you that:	Not satisfied		Satisfied		Not Surc
8-1 The Executive Director has established appropriate systems for dialogue and communication between the board and staff to ensure that the board maintains a good knowledge of the organization?	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input checked="" type="checkbox"/>	NS <input type="checkbox"/>
8-2 The Executive Director and senior staff have built effective working relationships with the officers of the board and committee chairs who are responsible for specific aspects of organizations governance?	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input checked="" type="checkbox"/>	NS <input type="checkbox"/>
8-3 The working relationships among the Executive Director, staff, and board are collegial?	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input checked="" type="checkbox"/>	NS <input type="checkbox"/>

9. External Liaison and Public Image

The Executive Director and board members are key players in establishing and maintaining positive relationships with the many groups that support the work of the nonprofit.

How satisfied are you that:	Not satisfied		Satisfied		Not Sure
9-1 The Executive Director maintains a positive professional reputation in the local community and is a good ambassador?	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input checked="" type="checkbox"/>	NS <input type="checkbox"/>
9-2 The Executive Director is an articulate and knowledgeable spokesperson?	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input checked="" type="checkbox"/>	NS <input type="checkbox"/>
9-3 The Executive Director is well regarded by his or her professional peers in the organization's area of focus?	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input checked="" type="checkbox"/>	NS <input type="checkbox"/>

10. Board Perceptions of the Organization

As the board reviews the performance of the Executive Director, it should also gauge its perceptions of the general operations and quality of the organization in the following areas. The responses to these questions may help to focus the board and the Executive Director's attention on specific areas of organizational strength and limitations and will help to guide future organizational development efforts.

How would you rate:	Not satisfied		Satisfied		Not Sure
	1	2	3	4	NS
a. Administration and Operations	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
b. Program Development and Delivery	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
c. Financial Management	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
d. Education	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
e. Long-Range and Strategic Planning	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
f. Client Services	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
g. Overall Quality of Staff Performance	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Open-Ending Questions

1. What are the three major strengths of the Executive Director?

- Management Skills
- Encourages Civility + Collaboration

2. What are some limitations in the Executive Director's performance?

None noted

3. What have been the most significant achievements of the Executive Director over the last year?

Fiscal management

4. What are areas in which the board could provide better support to the Executive Director?

None noted

5. Additional Comments:

We have the best Executive Director + staff. Proud to be a member,

RECEIVED

OCT 21 2015 **Reviewer 6**

TREASURE COAST
REGIONAL PLANNING COUNCIL

REGIONAL PLANNING COUNCIL

ASSESSMENT OF THE EXECUTIVE DIRECTOR

Treasure Coast Regional Planning Council

How to Complete the Questionnaire

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Each section begins with a brief description of an important area of responsibility. Please read it and then answer the questions that follow. The questions measure your level of satisfaction with how the Executive Director is carrying out various aspects of each responsibility. Check off the number representing the degree to which you are satisfied or not satisfied with the Executive Director's performance in each responsibility mentioned. The answer you mark can range on a scale of 1 to 4, with 1 representing "Very dissatisfied" and 4 representing "Very satisfied."

- 1 Very Dissatisfied
- 2 Dissatisfied
- 3 Satisfied
- 4 Very Satisfied

1. Vision, Mission, and Strategies*

The Executive Director's role has both strategic and operational components. Working with the board, the Executive Director must develop a shared vision for the future of the organization, building understanding around the current mission, and develop appropriate goals and strategies to advance that mission.

How satisfied are you that:	Not satisfied		Satisfied		Not Sure
1-1 The Executive Director has worked with the board to develop a clear vision for the organization and understands his or her own leadership role?	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input checked="" type="checkbox"/>	N/S <input type="checkbox"/>
1-2 The Executive Director has a sense of what must change and what must remain the same in order to accomplish the organization's mission and realize its vision?	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input checked="" type="checkbox"/>	N/S <input type="checkbox"/>

*The Strategic Regional Policy Plan and its implementation is Council's Long-range vision/plan.

2. Accomplishment of Management Objectives

Working with the board, the Executive Director establishes operational objectives that support the strategic plan. The Executive Director is responsible for leading the staff in the implementation of the strategic plan and any annual plans.

How satisfied are you that:	Not satisfied		Satisfied		Not Sure
2-1 The Executive Director selects and cultivates qualified senior staff, models effective behaviors and skills, and builds morale among staff and volunteers?	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input checked="" type="checkbox"/>	NS <input type="checkbox"/>

3. Program Management

Treasure Coast Regional Planning Council carries out its mission by offering specific programs and services. The Executive Director leads the staff in managing and administering these programs and services. This requires a thorough knowledge of the organization's mission areas as well as an understanding of technical, operational, and ethical issues.

How satisfied are you that:	Not satisfied		Satisfied		Not Sure
3-1 The Executive Director demonstrates substantive knowledge regarding the organization's programs and services?	1	2	3	4	NS
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
3-2 The Executive Director, through effective oversight and staffing, sets high standards of high quality for the organization's programs?	1	2	3	4	NS
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

4. Effectiveness in Fund Raising and Resource Development

The Executive Director, partnership with the board and appropriate staff, is responsible for developing and implementing appropriate financial development strategies. The Executive Director and board use their combined strengths, knowledge, and relationships to help the organization achieve its objectives.

How satisfied are you that:	Not satisfied		Satisfied		Not Sure
4-1 The Executive Director has a clear understanding of the current and future financial resources needed to realize the organization's mission?	1	2	3	4	NS
	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4-2 The Executive Director is effective and works well with staff, board members, and legislature to secure adequate funding commitments for the organization?	1	2	3	4	NS
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

5. Fiscal Management

Ensuring that income is managed wisely is especially important for a nonprofit organization operating in the public trust. It is the role of the Executive Director to see that solid planning and budgeting systems are in place and that the organization's goals and strategic plan serve as the basis for sound financial planning. In addition, it is the Executive Director's responsibility to ensure that qualified staff are hired to accurately monitor, assess, and manage the financial health of the nonprofit.

How satisfied are you that:	Not satisfied		Satisfied		Not Sure
5-1 The Executive Director is knowledgeable regarding planning and budget management of the organization?	1	2	3	4	NS
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
5-2 The Executive Director presents financial reports to the board on a regular basis and submits an annual budget for board review, revision, and approval?	1	2	3	4	NS
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

6. Operations Management

The Executive Director is responsible for day-to-day management. The Executive Director works with staff to develop, maintain, and use the systems and resources that facilitate the effective operation of the organization.

How satisfied are you that:	Not satisfied		Satisfied		Not Sure
6-1 The Executive Director is knowledgeable regarding the operation of an effective office environment?	1	2	3	4	NS
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
6-2 The Executive Director ensures compliance with all legal and regulatory requirements?	1	2	3	4	NS
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

7. The Executive Director/Board Partnership

The Executive Director and the board must work together as partners. Each arm of leadership draws upon its own unique strengths and abilities. The Executive Director and the board have joint responsibility for developing and maintaining a strong working relationship and a system for sharing information. The board is responsible for creating a written job description for the Executive Director that is clear and agreed to by all parties.

How satisfied are you that:	Not satisfied		Satisfied		Not Sure
7-1 The Executive Director and the board are clear about the differences between their respective roles?	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input checked="" type="checkbox"/>	4 <input type="checkbox"/>	NS <input type="checkbox"/>
7-2 The Executive Director is treated as a respected professional by members of the board?	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input checked="" type="checkbox"/>	NS <input type="checkbox"/>
7-3 The Executive Director has been delegated the authority necessary to manage the organization effectively?	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input checked="" type="checkbox"/>	NS <input type="checkbox"/>
7-4 The Executive Director raises issues and questions and provides adequate information to inform board discussions?	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input checked="" type="checkbox"/>	NS <input type="checkbox"/>
7-5 The Executive Director receives the annual review to which he or she is entitled in a timely and thoughtful way that articulates specific strengths and areas for improvement?	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input checked="" type="checkbox"/>	4 <input type="checkbox"/>	NS <input type="checkbox"/>

8. The Board/Staff Relationship

Because many organizational issues require a partnership of board and staff to be addressed effectively, the Executive Director should work to create opportunities for senior staff to interact with board members and to ensure that board and staff have a good working relationship.

How satisfied are you that:	Not satisfied		Satisfied		Not Sure
8-1 The Executive Director has established appropriate systems for dialogue and communication between the board and staff to ensure that the board maintains a good knowledge of the organization?	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	NS <input type="checkbox"/>
8-2 The Executive Director and senior staff have built effective working relationships with the officers of the board and committee chairs who are responsible for specific aspects of organizations governance?	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	NS <input type="checkbox"/>
8-3 The working relationships among the Executive Director, staff, and board are collegial?	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	NS <input type="checkbox"/>

9. External Liaison and Public Image

The Executive Director and board members are key players in establishing and maintaining positive relationships with the many groups that support the work of the nonprofit.

How satisfied are you that:	Not satisfied		Satisfied		Not Sure
9-1 The Executive Director maintains a positive professional reputation in the local community and is a good ambassador?	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	NS <input type="checkbox"/>
9-2 The Executive Director is an articulate and knowledgeable spokesperson?	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	NS <input type="checkbox"/>
9-3 The Executive Director is well regarded by his or her professional peers in the organization's area of focus?	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	NS <input type="checkbox"/>

10. Board Perceptions of the Organization

As the board reviews the performance of the Executive Director, it should also gauge its perceptions of the general operations and quality of the organization in the following areas. The responses to these questions may help to focus the board and the Executive Director's attention on specific areas of organizational strength and limitations and will help to guide future organizational development efforts.

How would you rate:	Not satisfied		Satisfied		Not Sure
	1	2	3	4	
a. Administration and Operations	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
b. Program Development and Delivery	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
c. Financial Management	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
d. Education	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
e. Long-Range and Strategic Planning	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
f. Client Services	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
g. Overall Quality of Staff Performance	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Open-Ending Questions

1. What are the three major strengths of the Executive Director?

Professionalism
Not quick to judge or respond - thoughtful
Accountable

2. What are some limitations in the Executive Director's performance?

possibly too reserved.

3. What have been the most significant achievements of the Executive Director over the last year?

Managing without the state funds being allocated. Balancing and deflecting the critics.

4. What are areas in which the board could provide better support to the Executive Director?

5. Additional Comments:

Reviewer 7

TREASURE COAST REGIONAL
PLANNING COUNCIL

ASSESSMENT OF THE
EXECUTIVE DIRECTOR

How to Complete the Questionnaire

This questionnaire is designed to help you, your board colleagues, and the Executive Director assess the Executive Director's performance. It should take you 30 to 60 minutes to complete. To encourage candor, the questionnaire does not ask for your name. Your confidential responses, along with the responses of your colleagues, will be summarized and shared with the Executive Director at a meeting with a small committee of the board.

Each section begins with a brief description of an important area of responsibility. Please read it and then answer the questions that follow. The questions measure your level of satisfaction with how the Executive Director is carrying out various aspects of each responsibility. Check off the number representing the degree to which you are satisfied or not satisfied with the Executive Director's performance in each responsibility mentioned. The answer you mark can range on a scale of 1 to 4, with 1 representing "Very dissatisfied" and 4 representing "Very satisfied."

- 1 **Very Dissatisfied**
- 2 **Dissatisfied**
- 3 **Satisfied**
- 4 **Very Satisfied**

1. Vision, Mission, and Strategies*

The Executive Director's role has both strategic and operational components. Working with the board, the Executive Director must develop a shared vision for the future of the organization, building understanding around the current mission, and develop appropriate goals and strategies to advance that mission.

How satisfied are you that:	Not satisfied	Satisfied	Not Sure		
1-1 The Executive Director has worked with the board to develop a clear vision for the organization and understands his or her own leadership role?	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input checked="" type="checkbox"/>	N/S <input type="checkbox"/>
1-2 The Executive Director has a sense of what must change and what must remain the same in order to accomplish the organization's mission and realize its vision?	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input checked="" type="checkbox"/>	N/S <input type="checkbox"/>

*The Strategic Regional Policy Plan and its implementation is Council's Long-range vision/plan.

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Working with the board, the Executive Director establishes operational objectives that support the strategic plan. The Executive Director is responsible for leading the staff in the implementation of the strategic plan and any annual plans.

How satisfied are you that:	Not satisfied	Satisfied	Not Sure		
2-1 The Executive Director selects and cultivates qualified senior staff, models effective behaviors and skills, and builds morale among staff and volunteers?	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input checked="" type="checkbox"/>	NS <input type="checkbox"/>

3. Program Management

Treasure Coast Regional Planning Council carries out its mission by offering specific programs and services. The Executive Director leads the staff in managing and administering these programs and services. This requires a thorough knowledge of the organization's mission areas as well as an understanding of technical, operational, and ethical issues.

How satisfied are you that:	Not satisfied		Satisfied		Not Sure
3-1 The Executive Director demonstrates substantive knowledge regarding the organization's programs and services?	1	2	3	4	NS
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
3-2 The Executive Director, through effective oversight and staffing, sets high standards of high quality for the organization's programs?	1	2	3	4	NS
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

4. Effectiveness in Fund Raising and Resource Development

The Executive Director, partnership with the board and appropriate staff, is responsible for developing and implementing appropriate financial development strategies. The Executive Director and board use their combined strengths, knowledge, and relationships to help the organization achieve its objectives.

How satisfied are you that:	Not satisfied		Satisfied		Not Sure
4-1 The Executive Director has a clear understanding of the current and future financial resources needed to realize the organization's mission?	1	2	3	4	NS
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
4-2 The Executive Director is effective and works well with staff, board members, and legislature to secure adequate funding commitments for the organization?	1	2	3	4	NS
	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

5. Fiscal Management

Ensuring that income is managed wisely is especially important for a nonprofit organization operating in the public trust. It is the role of the Executive Director to see that solid planning and budgeting systems are in place and that the organization's goals and strategic plan serve as the basis for sound financial planning. In addition, it is the Executive Director's responsibility to ensure that qualified staff are hired to accurately monitor, assess, and manage the financial health of the nonprofit.

How satisfied are you that:	Not satisfied		Satisfied		Not Sure
5-1 The Executive Director is knowledgeable regarding planning and budget management of the organization?	1	2	3	4	NS
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
5-2 The Executive Director presents financial reports to the board on a regular basis and submits an annual budget for board review, revision, and approval?	1	2	3	4	NS
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

6. Operations Management

The Executive Director is responsible for day-to-day management. The Executive Director works with staff to develop, maintain, and use the systems and resources that facilitate the effective operation of the organization.

How satisfied are you that:	Not satisfied		Satisfied		Not Sure
6-1 The Executive Director is knowledgeable regarding the operation of an effective office environment?	1	2	3	4	NS
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
6-2 The Executive Director ensures compliance with all legal and regulatory requirements?	1	2	3	4	NS
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

7. The Executive Director/Board Partnership

The Executive Director and the board must work together as partners. Each arm of leadership draws upon its own unique strengths and abilities. The Executive Director and the board have joint responsibility for developing and maintaining a strong working relationship and a system for sharing information. The board is responsible for creating a written job description for the Executive Director that is clear and agreed to by all parties.

How satisfied are you that:	Not satisfied		Satisfied		Not Sure
7-1 The Executive Director and the board are clear about the differences between their respective roles?	1	2	3	4	NS
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
7-2 The Executive Director is treated as a respected professional by members of the board?	1	2	3	4	NS
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
7-3 The Executive Director has been delegated the authority necessary to manage the organization effectively?	1	2	3	4	NS
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
7-4 The Executive Director raises issues and questions and provides adequate information to inform board discussions?	1	2	3	4	NS
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
7-5 The Executive Director receives the annual review to which he or she is entitled in a timely and thoughtful way that articulates specific strengths and areas for improvement?	1	2	3	4	NS
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

8. The Board/Staff Relationship

Because many organizational issues require a partnership of board and staff to be addressed effectively, the Executive Director should work to create opportunities for senior staff to interact with board members and to ensure that board and staff have a good working relationship.

How satisfied are you that:	Not satisfied		Satisfied		Not Sure
8-1 The Executive Director has established appropriate systems for dialogue and communication between the board and staff to ensure that the board maintains a good knowledge of the organization?	1	2	3	4	NS
	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
8-2 The Executive Director and senior staff have built effective working relationships with the officers of the board and committee chairs who are responsible for specific aspects of organizations governance?	1	2	3	4	NS
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
8-3 The working relationships among the Executive Director, staff, and board are collegial?	1	2	3	4	NS
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

9. External Liaison and Public Image

The Executive Director and board members are key players in establishing and maintaining positive relationships with the many groups that support the work of the nonprofit.

How satisfied are you that:	Not satisfied		Satisfied		Not Sure
9-1 The Executive Director maintains a positive professional reputation in the local community and is a good ambassador?	1	2	3	4	NS
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
9-2 The Executive Director is an articulate and knowledgeable spokesperson?	1	2	3	4	NS
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
9-3 The Executive Director is well regarded by his or her professional peers in the organization's area of focus?	1	2	3	4	NS
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

10. Board Perceptions of the Organization

As the board reviews the performance of the Executive Director, it should also gauge its perceptions of the general operations and quality of the organization in the following areas. The responses to these questions may help to focus the board and the Executive Director's attention on specific areas of organizational strength and limitations and will help to guide future organizational development efforts.

How would you rate:	Not satisfied		Satisfied		Not Sure
	1	2	3	4	NS
a. Administration and Operations	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
b. Program Development and Delivery	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
c. Financial Management	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
d. Education	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
e. Long-Range and Strategic Planning	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
f. Client Services	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
g. Overall Quality of Staff Performance	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Reviewer 8

REGIONAL PLANNING COUNCIL

ASSESSMENT OF THE
EXECUTIVE DIRECTOR

Treasure Coast Regional Planning Council

How to Complete the Questionnaire

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- 1 Very Dissatisfied
- 2 Dissatisfied
- 3 Satisfied
- 4 Very Satisfied

1. Vision, Mission, and Strategies*

The Executive Director's role has both strategic and operational components. Working with the board, the Executive Director must develop a shared vision for the future of the organization, building understanding around the current mission, and develop appropriate goals and strategies to advance that mission.

How satisfied are you that:	Not satisfied		Satisfied		Not Sure
1-1 The Executive Director has worked with the board to develop a clear vision for the organization and understands his or her own leadership role?	1	2	3	4	N/S
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
1-2 The Executive Director has a sense of what must change and what must remain the same in order to accomplish the organization's mission and realize its vision?	1	2	3	4	N/S
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

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How satisfied are you that:	Not satisfied		Satisfied		Not Sure
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How satisfied are you that:	Not satisfied		Satisfied		Not Sure
3-1 The Executive Director demonstrates substantive knowledge regarding the organization's programs and services?	1	2	3	4	NS
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
3-2 The Executive Director, through effective oversight and staffing, sets high standards of high quality for the organization's programs?	1	2	3	4	NS
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

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	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
4-2 The Executive Director is effective and works well with staff, board members, and legislature to secure adequate funding commitments for the organization?	1	2	3	4	NS
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

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How satisfied are you that:	Not satisfied		Satisfied		Not Sure
5-1 The Executive Director is knowledgeable regarding planning and budget management of the organization?	1	2	3	4	NS
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
5-2 The Executive Director presents financial reports to the board on a regular basis and submits an annual budget for board review, revision, and approval?	1	2	3	4	NS
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

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How satisfied are you that:	Not satisfied		Satisfied		Not Sure
6-1 The Executive Director is knowledgeable regarding the operation of an effective office environment?	1	2	3	4	NS
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
6-2 The Executive Director ensures compliance with all legal and regulatory requirements?	1	2	3	4	NS
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

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The Executive Director and the board must work together as partners. Each arm of leadership draws upon its own unique strengths and abilities. The Executive Director and the board have joint responsibility for developing and maintaining a strong working relationship and a system for sharing information. The board is responsible for creating a written job description for the Executive Director that is clear and agreed to by all parties.

How satisfied are you that:	Not satisfied		Satisfied		Not Sure
7-1 The Executive Director and the board are clear about the differences between their respective roles?	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input checked="" type="checkbox"/>	NS <input type="checkbox"/>
7-2 The Executive Director is treated as a respected professional by members of the board?	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input checked="" type="checkbox"/>	NS <input type="checkbox"/>
7-3 The Executive Director has been delegated the authority necessary to manage the organization effectively?	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input checked="" type="checkbox"/>	NS <input type="checkbox"/>
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8. The Board/Staff Relationship

Because many organizational issues require a partnership of board and staff to be addressed effectively, the Executive Director should work to create opportunities for senior staff to interact with board members and to ensure that board and staff have a good working relationship.

How satisfied are you that:	Not satisfied		Satisfied		Not Sure
8-1 The Executive Director has established appropriate systems for dialogue and communication between the board and staff to ensure that the board maintains a good knowledge of the organization?	1	2	3	4	NS
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
8-2 The Executive Director and senior staff have built effective working relationships with the officers of the board and committee chairs who are responsible for specific aspects of organizations governance?	1	2	3	4	NS
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
8-3 The working relationships among the Executive Director, staff, and board are collegial?	1	2	3	4	NS
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

9. External Liaison and Public Image

The Executive Director and board members are key players in establishing and maintaining positive relationships with the many groups that support the work of the nonprofit.

How satisfied are you that:	Not satisfied		Satisfied		Not Sure
9-1 The Executive Director maintains a positive professional reputation in the local community and is a good ambassador?	1	2	3	4	NS
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
9-2 The Executive Director is an articulate and knowledgeable spokesperson?	1	2	3	4	NS
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
9-3 The Executive Director is well regarded by his or her professional peers in the organization's area of focus?	1	2	3	4	NS
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

10. Board Perceptions of the Organization

As the board reviews the performance of the Executive Director, it should also gauge its perceptions of the general operations and quality of the organization in the following areas. The responses to these questions may help to focus the board and the Executive Director's attention on specific areas of organizational strength and limitations and will help to guide future organizational development efforts.

How would you rate:	Not satisfied		Satisfied		Not Sure
	1	2	3	4	
a. Administration and Operations	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
b. Program Development and Delivery	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
c. Financial Management	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
d. Education	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
e. Long-Range and Strategic Planning	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
f. Client Services	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
g. Overall Quality of Staff Performance	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

**TREASURE COAST REGIONAL
PLANNING COUNCIL**

**ASSESSMENT OF THE
EXECUTIVE DIRECTOR**

How to Complete the Questionnaire

This questionnaire is designed to help you, your board colleagues, and the Executive Director assess the Executive Director's performance. It should take you 30 to 60 minutes to complete. To encourage candor, the questionnaire does not ask for your name. Your confidential responses, along with the responses of your colleagues, will be summarized and shared with the Executive Director at a meeting with a small committee of the board.

Each section begins with a brief description of an important area of responsibility. Please read it and then answer the questions that follow. The questions measure your level of satisfaction with how the Executive Director is carrying out various aspects of each responsibility. Check off the number representing the degree to which you are satisfied or not satisfied with the Executive Director's performance in each responsibility mentioned. The answer you mark can range on a scale of 1 to 4, with 1 representing "Very dissatisfied" and 4 representing "Very satisfied."

- 1 Very Dissatisfied
- 2 Dissatisfied
- 3 Satisfied
- 4 Very Satisfied

1. Vision, Mission, and Strategies*

The Executive Director's role has both strategic and operational components. Working with the board, the Executive Director must develop a shared vision for the future of the organization, building understanding around the current mission, and develop appropriate goals and strategies to advance that mission.

How satisfied are you that:	Not satisfied		Satisfied		Not Sure
1-1 The Executive Director has worked with the board to develop a clear vision for the organization and understands his or her own leadership role?	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input checked="" type="checkbox"/>	N/S <input type="checkbox"/>
1-2 The Executive Director has a sense of what must change and what must remain the same in order to accomplish the organization's mission and realize its vision?	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input checked="" type="checkbox"/>	N/S <input type="checkbox"/>

*The Strategic Regional Policy Plan and its implementation is Council's Long-range vision/plan.

2. Accomplishment of Management Objectives

Working with the board, the Executive Director establishes operational objectives that support the strategic plan. The Executive Director is responsible for leading the staff in the implementation of the strategic plan and any annual plans.

How satisfied are you that:	Not satisfied		Satisfied		Not Sure
2-1 The Executive Director selects and cultivates qualified senior staff, models effective behaviors and skills, and builds morale among staff and volunteers?	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input checked="" type="checkbox"/>	NS <input type="checkbox"/>

3. Program Management

Treasure Coast Regional Planning Council carries out its mission by offering specific programs and services. The Executive Director leads the staff in managing and administering these programs and services. This requires a thorough knowledge of the organization's mission areas as well as an understanding of technical, operational, and ethical issues.

How satisfied are you that:	Not satisfied		Satisfied		Not Sure
3-1 The Executive Director demonstrates substantive knowledge regarding the organization's programs and services?	1	2	3	4	NS
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
3-2 The Executive Director, through effective oversight and staffing, sets high standards of high quality for the organization's programs?	1	2	3	4	NS
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

4. Effectiveness in Fund Raising and Resource Development

The Executive Director, partnership with the board and appropriate staff, is responsible for developing and implementing appropriate financial development strategies. The Executive Director and board use their combined strengths, knowledge, and relationships to help the organization achieve its objectives.

How satisfied are you that:	Not satisfied		Satisfied		Not Sure
4-1 The Executive Director has a clear understanding of the current and future financial resources needed to realize the organization's mission?	1	2	3	4	NS
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
4-2 The Executive Director is effective and works well with staff, board members, and legislature to secure adequate funding commitments for the organization?	1	2	3	4	NS
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

5. Fiscal Management

Ensuring that income is managed wisely is especially important for a nonprofit organization operating in the public trust. It is the role of the Executive Director to see that solid planning and budgeting systems are in place and that the organization's goals and strategic plan serve as the basis for sound financial planning. In addition, it is the Executive Director's responsibility to ensure that qualified staff are hired to accurately monitor, assess, and manage the financial health of the nonprofit.

How satisfied are you that:	Not satisfied		Satisfied		Not Sure
5-1 The Executive Director is knowledgeable regarding planning and budget management of the organization?	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input checked="" type="checkbox"/>	NS <input type="checkbox"/>
5-2 The Executive Director presents financial reports to the board on a regular basis and submits an annual budget for board review, revision, and approval?	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input checked="" type="checkbox"/>	NS <input type="checkbox"/>

6. Operations Management

The Executive Director is responsible for day-to-day management. The Executive Director works with staff to develop, maintain, and use the systems and resources that facilitate the effective operation of the organization.

How satisfied are you that:	Not satisfied		Satisfied		Not Sure
6-1 The Executive Director is knowledgeable regarding the operation of an effective office environment?	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input checked="" type="checkbox"/>	NS <input type="checkbox"/>
6-2 The Executive Director ensures compliance with all legal and regulatory requirements?	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input checked="" type="checkbox"/>	NS <input type="checkbox"/>

7. The Executive Director/Board Partnership

The Executive Director and the board must work together as partners. Each arm of leadership draws upon its own unique strengths and abilities. The Executive Director and the board have joint responsibility for developing and maintaining a strong working relationship and a system for sharing information. The board is responsible for creating a written job description for the Executive Director that is clear and agreed to by all parties.

How satisfied are you that:	Not satisfied		Satisfied		Not Sure
7-1 The Executive Director and the board are clear about the differences between their respective roles?	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input checked="" type="checkbox"/>	NS <input type="checkbox"/>
7-2 The Executive Director is treated as a respected professional by members of the board?	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input checked="" type="checkbox"/>	NS <input type="checkbox"/>
7-3 The Executive Director has been delegated the authority necessary to manage the organization effectively?	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input checked="" type="checkbox"/>	NS <input type="checkbox"/>
7-4 The Executive Director raises issues and questions and provides adequate information to inform board discussions?	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input checked="" type="checkbox"/>	NS <input type="checkbox"/>
7-5 The Executive Director receives the annual review to which he or she is entitled in a timely and thoughtful way that articulates specific strengths and areas for improvement?	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input checked="" type="checkbox"/>	NS <input type="checkbox"/>

8. The Board/Staff Relationship

Because many organizational issues require a partnership of board and staff to be addressed effectively, the Executive Director should work to create opportunities for senior staff to interact with board members and to ensure that board and staff have a good working relationship.

How satisfied are you that:	Not satisfied		Satisfied		Not Sure
8-1 The Executive Director has established appropriate systems for dialogue and communication between the board and staff to ensure that the board maintains a good knowledge of the organization?	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input checked="" type="checkbox"/>	NS <input type="checkbox"/>
8-2 The Executive Director and senior staff have built effective working relationships with the officers of the board and committee chairs who are responsible for specific aspects of organizations governance?	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input checked="" type="checkbox"/>	NS <input type="checkbox"/>
8-3 The working relationships among the Executive Director, staff, and board are collegial?	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input checked="" type="checkbox"/>	NS <input type="checkbox"/>

9. External Liaison and Public Image

The Executive Director and board members are key players in establishing and maintaining positive relationships with the many groups that support the work of the nonprofit.

How satisfied are you that:	Not satisfied		Satisfied		Not Sure
9-1 The Executive Director maintains a positive professional reputation in the local community and is a good ambassador?	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input checked="" type="checkbox"/>	NS <input type="checkbox"/>
9-2 The Executive Director is an articulate and knowledgeable spokesperson?	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input checked="" type="checkbox"/>	NS <input type="checkbox"/>
9-3 The Executive Director is well regarded by his or her professional peers in the organization's area of focus?	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input checked="" type="checkbox"/>	NS <input type="checkbox"/>

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As the board reviews the performance of the Executive Director, it should also gauge its perceptions of the general operations and quality of the organization in the following areas. The responses to these questions may help to focus the board and the Executive Director's attention on specific areas of organizational strength and limitations and will help to guide future organizational development efforts.

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	1	2	3	4	NS
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d. Education	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
e. Long-Range and Strategic Planning	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
f. Client Services	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
g. Overall Quality of Staff Performance	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

