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Frontline Perspectives

FOR NONPROFIT BOARD AND STAFF LEADERS

January/February 2017

Bryan Orander, president, Charitable Advisors

The Dreaded Executive Director/CEO Evaluation

It's January in your organization and someone is supposed to be reminding someone else that performance evaluations are due soon and raises are probably contingent on completing them.

Nonprofit Board Leader's Perspective	Nonprofit ED/CEO's Perspective
Is he/she doing OK? What criteria would we use? Are we risking any bad feelings? What do they do day to day? How do I get this done quickly?	Do they value me in my role? Can the board take the lead this year? Will I get a raise? A bonus? Can we have a candid discussion about our organizational and board performance?

I hope you can smile at some of these thoughts and comments. Not many people get excited about annual performance evaluations. Too often, performance reviews only happen when things have gotten seriously off track.

I am a big fan of the on-line, [Blue Avocado](#) board publication. The authors of [this article](#) do a terrific job explaining this critical leadership routine and provide a Word form as a good starting point for most nonprofits.

That being said, I see two opportunities for improvement: 1) soliciting feedback from staff on the ED/CEOs performance is a tricky situation. I have had success surveying the staff about how the organization is doing and incorporating that information, and 2) the survey format in the article does not reference evaluating specific goals set by the organization so you will want to identify those separately in preparing for your evaluation conversation.

Executive Director Evaluation (Downloadable Evaluation form as Word doc at end of linked article under "File Attachments" next to social media links.)

For assistance in getting started with a regular ED/CEO process or refining your current process, please contact Bryan at Bryan@ChritableAdvisors.com or 317-752-7153.

Create a better board meeting

Allow time and space on the meeting agenda for an open-ended discussion about an important issue facing the organization or its clients. Issues might include changes in the demographics served or key issues addressed, shifts in best practices in your industry or potential impacts of elections, etc.

For January or February ask "What is success for our board in 2017?" or "What is success for our organization in 2017?"



SEEKING WISDOM

In each edition, we will feature a situation that has been submitted to us or that we have seen in our work with small to mid-sized nonprofits. Please share your thoughts on how the leader could respond to his/her situation. In addition, send us your ideas for future dilemmas to explore. A summary of responses will be shared in subsequent editions.

Situation: Who are our next board leaders?

I am an executive committee member of a small nonprofit. Our board has typically had 8-10 members. The four officers have been on the board for 6-7 years and we are tired and ready to move on. Our problem is that none of the other board members seem interested in taking on leadership roles and we are not sure they would be very effective if they did step up.

I'm "Seeking Wisdom" to help our organization serve our clients and allow me to rotate off the board.

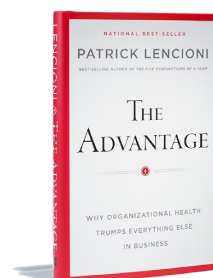
Share your feedback by e-mail to: Bryan@CharitableAdvisors.com or on our [Facebook page](#).

Submit your situational or ethical dilemma here



YOUR READING LIST

In 2016, I bumped into one book that more nonprofit leaders were reading with their teams than any other - "**The Advantage**" by Patrick Lencioni. He presents concepts from his past best sellers like "Death by Meeting" and "Five Dysfunctions of Team" with a broader view of organizational health. Consider reading it and using it with your senior team in 2017. [For a review of the book, click here.](#)



SELECTED CHARITABLE ADVISORS NONPROFIT RESOURCES

[Nonprofit Job Board](#)

[How to place a Job ad](#)

[Real estate to lease or
for events/meetings](#)

[2016 Charitable Advisors
Nonprofit Salary Survey](#)

I started Charitable Advisors in 2000 with a vision to offer more than traditional consulting services and to become a connector, advocate, and problem solver for the nonprofit sector. This approach has made Charitable Advisors a critical component of the central Indiana nonprofit infrastructure. Over the past 6-7 years, we have supported more nonprofits through leadership transitions and retirements than any other area firm. Nonprofits post 1,000 job openings each year on our nonprofit job board. We research and publish the local nonprofit salary survey and we keep thousands of nonprofit leaders informed each week through the Indianapolis Not-for-profit News e-mail newsletter.

Contact me if your organization is preparing for its next strategic planning cycle, envisioning a new focus on board development, or preparing for a planned or unexpected leadership transition.

Bryan Orander, President - Charitable Advisors



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