

Tampa Bay Regional Planning Council

Assessment of the Executive Director

How to Complete the Questionnaire

This questionnaire is designed to help you and the Executive Director assess the Executive Director's performance. It should take you 30 to 60 minutes to complete. Your responses, along with the responses of your colleagues, will be summarized and shared with the Executive Director.

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 the highest degree of satisfaction.**

Comment lines have been provided and **may or may not** be used at your discretion.

It is understood that some Executive Committee members are not able to answer all questions due to lack of interaction with the Executive Director in all areas. For those instances, you may use

Not Qualified to answer

and/or

Comment: _____

Sample question

How satisfied are you that:

1-1	The Executive Director has worked with the board to develop a clear vision for the TBRPC and understands his or her own role in leading the organization forward.	1	2	3	4	Not Qualified to answer
		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

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:

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 Not Qualified to answer

Comment: _____

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 Not Qualified to answer

Comment: _____

2. Accomplishment of Management Objectives

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

How satisfied are you that:

2-1 The Executive Director selects and cultivates qualified senior staff, models effective behaviors and skills, and builds morale among staff and volunteers?

1 2 3 4 Not Qualified to answer

Comments: _____

3. Program Management

Tampa Bay 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:

3-1 The Executive Director demonstrates substantive knowledge regarding the organization's programs and services? 1 2 3 4 Not Qualified to answer

Comments: _____

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 Not Qualified to answer

Comments: _____

4. Effectiveness in Fund Raising and Resource Development

The Executive Director, in 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 in objectives.

How satisfied are you that:

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 Not Qualified to answer

Comments: _____

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 Not Qualified to answer

Comments: _____

5. Fiscal Management

Ensuring that income is managed wisely is especially important to the Regional Planning Council. 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 Council

How satisfied are you that:

5-1 The Executive Director is knowledgeable regarding planning and budget management of the organization?
 1 2 3 4 Not Qualified to answer

Comments: _____

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 Not Qualified to answer

Comments: _____

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:

6-1 The Executive Director is knowledgeable regarding the operation of an effective office environment? 1 2 3 4 Not Qualified to answer

Comments: _____

6-2 The Executive Director ensures compliance with all legal and regulatory requirements? 1 2 3 4 Not Qualified to answer

Comments: _____

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:

7-1 The Executive Director and the board are clear about the differences between their respective roles? 1 2 3 4 Not Qualified to answer

Comments: _____

7-2 The Executive Director is treated as a respected professional by members of the board? 1 2 3 4 Not Qualified to answer

Comments: _____

7-3 The Executive Director has been delegated the authority necessary to manage the organization effectively? 1 2 3 4 Not Qualified to answer

Comments: _____

7-4 The Executive Director raises issues and questions and provides adequate information to inform board discussions? 1 2 3 4 Not Qualified to answer

Comments: _____

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:

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 Not Qualified to answer

Comments: _____

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 organizational governance? 1 2 3 4 Not Qualified to answer

Comments: _____

8-3 The working relationships among the Executive Director, staff, and board are collegial? 1 2 3 4 Not Qualified to answer

Comments: _____

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 Council.

How satisfied are you that:

9-1 The Executive Director maintains a positive professional reputation in the local community and is a good ambassador? 1 2 3 4 Not Qualified to answer

Comments: _____

9-2 The Executive Director is knowledgeable and communicates well with others? 1 2 3 4 Not Qualified to answer

Comments: _____

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 Not Qualified to answer

Comments: _____

9-4 The Executive Director is effective in directing marketing/public relations of the organization. 1 2 3 4 Not Qualified to answer

Comments: _____

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 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:

a. Administration and Operations 1 2 3 4 Not Qualified to answer

b. Program Development and Delivery 1 2 3 4 Not Qualified to answer

c. Financial Management 1 2 3 4 Not Qualified to answer

d. Education 1 2 3 4 Not Qualified to answer

e. Long-Range and Strategic Planning 1 2 3 4 Not Qualified to answer

f. Technical Assistance Services 1 2 3 4 Not Qualified to answer

g. Overall Quality of Staff Performance 1 2 3 4 Not Qualified to answer

Comments: _____

11. Executive Director's 2002/2003 Goals

The following goals were set by the Executive Committee in October 2001.

How would you rate:

a.	Seek funding for TBRPC initiatives.	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	Not Qualified to answer <input type="checkbox"/>
b.	Accomplish activities and deliverables in TBRPC Annual Initiatives Plan	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	Not Qualified to answer <input type="checkbox"/>
c.	Promote Council philosophy and programs through public speeches, workshops, and meetings.	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	Not Qualified to answer <input type="checkbox"/>
d.	Oversee development of Annual Budget by June 30, 2003.	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	Not Qualified to answer <input type="checkbox"/>
e.	Oversee completion of Annual Audit by December 31, 2002.	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	Not Qualified to answer <input type="checkbox"/>
f.	Serve as liaison to the community on behalf of TBRPC.	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	Not Qualified to answer <input type="checkbox"/>
g.	Coordinate TBRPC activities with officials and staff of member governments.	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	Not Qualified to answer <input type="checkbox"/>
h.	Foster and promote regional collaborative efforts.	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	Not Qualified to answer <input type="checkbox"/>

Comments: _____

Open Ended Questions

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

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

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

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

5. Additional comments:

Signature: _____

Date: _____

Revised: August 19, 2003

