

FREY FOUNDATION

PRESIDENT'S PERFORMANCE EVALUATION FORM

Please select a rating from the drop down list for each category below by clicking on the arrow located on the bottom right corner of the cell in the rating column. The subtotal for each section and the grand total will auto calculate. Additional notes are encouraged but optional.

Performance Categories	Rating <i>(select from drop down)</i>	Points	Notes <i>(optional)</i>
Leadership			
1. Board of Trustees Relations: Works well with all Trustees individually and as a unit, is accessible and responsive, provides sufficient information for the Trustees to make thoughtful decisions, creates opportunities to involve Trustees in various aspects of the Foundation's activities, ensures that the Trustees are supported to conduct effective governance.		0	
2. Planning & Organizing: Demonstrates an understanding of the Foundation's mission and priorities, establishes effective courses of action to implement the goals and objectives set forth by the Board of Trustees.		0	
3. Vision: Clearly articulates a vision for the future of the organization, considers issues that are broader and longer range.		0	
4. Judgment & Decisiveness: Makes well-timed and sound decisions, takes action in a timely manner, meets deadlines, solves problems promptly, and sets appropriate priorities for tasks.		0	
5. Identity Management: Works with the Trustees and Team to ensure proper care and development of the Foundation's history, culture, reputation, brand and image.		0	
Leadership Subtotal		0	20 points possible
People Development			
6. Team Building and Conflict Resolution: Fosters collaborative work among both Trustees and Team, is a good team player, facilitates work group effectiveness, resolves conflicting interests fairly.		0	
7. Sensitivity: Demonstrates consideration for others, shows appreciation for the work done by others, makes an effort to put people at ease, and solicits feedback and opinions from others.		0	

8. Initiative: Sets high goals/standards of performance for self and others, originates action rather than only responding to action of others.		0	
9. Values & Ethical Standards: Works with the Trustees and Team to ensure adoption of and adherence to appropriate values and ethical standards in all foundation business.		0	
10. Professional Knowledge: Understands and stays abreast of current issues in the philanthropic and social investment fields and in the issues the foundation has prioritized.		0	
People Development Subtotal		0	20 points possible
Management			
11. Grantmaking: Provides leadership and vision for grantmaking priorities and portfolio, supports Program team with due diligence, proposal evaluation, and exercises prudent recommendations for all grantmaking programs.		0	
12. Management: Manages and motivates the team effectively, provides clear direction, measures results, gives timely feedback, establishes communication channels, ensures quality work performance and timely completion of tasks, fosters a comfortable work environment, delegates, mentors and enhances the skills of the team, promotes a welcoming and helpful approach to all foundation stakeholders.		0	
13. Financial Management: Demonstrates effective oversight of the financial health and well-being of the foundation, including budgeting. Ensures that the operations are soundly managed, and that financial information is clearly communicated to Trustees.		0	
14. Legal Issues: Works with the Trustees and Team to ensure compliance in all areas, obtain legal representation when necessary and prudent.		0	
Management Subtotal		0	16 points possible
Communications			
15. External Relations: Develops effective working relationships and networks with other funders, interacts well and respectfully with the grantee community, participates as a panelist or speaker, acts as a spokesperson for the Foundation, and enhances the Foundation's image in the philanthropic community and beyond.		0	
16. Oral Communication: Gives and receives information effectively, clearly presents ideas/tasks, listens to others.		0	

17. Written Communication: Expresses ideas in a clear and effective manner, oversees the preparation of reports and memos that are easily understood and responsive to the needs of the Trustees, and advances the Foundation's communications and information systems.		0	
Communications Subtotal		0	12 points possible
Grand Total		0	68 points possible
Additional Questions			
18. What one or two major strengths or significant achievements of the President would you like to highlight?			
19. What areas of development would you suggest for the President's performance?			
20. What should be included in the organizational and/or personal goals for the President during the next year?			
21. Additional Comments/Recommendations:			

Your Name

Date