

## **Recommended Process for In depth/Reappointment Review of Association Executive Directors**

1. Executive Director provides names for a stakeholder/colleague survey to State Specialist. The State Specialist distributes the survey to a sample of provided names plus some others, receives responses, and works with the Board President to develop a summary of the responses.

2. Executive Director prepares self-appraisal:

Form C completed around the goals articulated in Form B during the last review

An additional piece listing important accomplishments outside of the Form B goals articulated in the last review, and important intervening circumstances during the review period.

A new Form A and a draft form B applicable to the next review period.

A Learning Plan for the next review period.

3. Self-appraisal materials are forwarded to Association President and State Specialist one week ahead of appraisal meeting. The survey summary is sent to the Executive Director.

4. Performance appraisal meeting is held with the Board (alternatively, key Board leadership). During this meeting:

- The Executive Director provides a brief verbal synopsis of the self appraisal, the past year's goals attainment, and especially, goals proposed for the next year.

**OR...** the ED gives a 10 minute "State of the Association Report" that includes the overall situation, developments of the past year, and needed goals and action in the upcoming year.

- An open dialog with Board leaders ensues, to include any questions of board members about the report and feedback from the members about past performance and especially, proposed goals.
- An executive session follows with the Executive Director excused, allowing the board to have an open dialog and assure all Board thoughts can be freely aired and discussed. The contingent provides input and topics for the appraisal interview and recommends the overall rating to be used.
- The Board reconvenes and acts on a motion regarding employment reappointment of the Executive Director. (more)

5. An in-depth review interview is conducted between the Executive Director, the Board President, and the State Specialist, covering feedback of discussion at the Executive Session, the survey, and all other relevant materials. Ideally, the Vice President also takes part to provide future continuity.
6. The State Specialist or Board President drafts a written review summary of key points covered during the interview. Form B and the Learning Plan are also adjusted if needed.
7. The draft review is shared with the Executive Director, State Specialist, and Board President who review all the sections for accuracy, clear communication, and to determine if any new questions emerge. Feedback is provided to the drafter of the summary. If new questions are raised, the parties get together and discuss them. The Executive Director can either add “Employee Comments” at this point, or at the time of signing (see 9.).
8. Final revisions are made, based on feedback received.
9. The Director, President, and State Specialist sign three original copies. One signed copy goes to the Executive Director, another to the Association file, and the final to Cornell via the State Specialist.