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The Dangers of NOT Utilizing Performance Reviews for Your Nonprofit Leadership and Board Members

April 20, 2023

Dennis C. Miller, Founder & Chairman

DCM Associates, Inc.

Not-for-Profit Council

Dennis C. Miller
Founder and Chairman

Dennis is a nationally recognized strategic leadership coach and executive search consultant with more than thirty-five years of experience working with nonprofit board leadership and chief executives across the country. Dennis is also an expert in board governance, leadership development, philanthropy and succession planning. In addition, he is a successful author, sought-after motivational speaker, retreat facilitator and leadership performance coach. Dennis' experience working with hundreds of nonprofit organizations has provided him with the knowledge and insights to understand the competencies required of today's nonprofit leadership.

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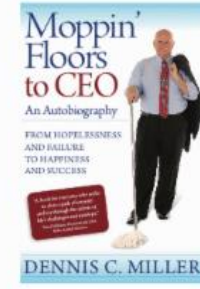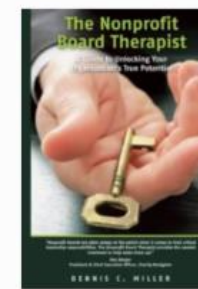
Discussion Agenda

- The Dangers of Not Utilizing Performance Reviews

- The Benefits of Performance Evaluations and Assessments

- Best Evaluation and Performance Review Practices

The Dangers of Not Utilizing Performance Reviews

- Lost Opportunity for Performance Improvement
- The Cost of Poor Performance
- Decreased Morale
- Failure to Set Goals
- Lack of Clear Expectations
- Acceptance of the Status Quo

The Dangers of Not Utilizing Performance Reviews (cont'd)

- Poor Results and Decreased Social Impact
- Low Attendance at Board Meetings
- The Disruptive Board Member
- Poor Brand Building
- Organizational Underperformance
- Lack of Incentives to Achieve Success

The Benefits of Performance Evaluations and Assessments

- Opportunity to Gain Insights for Improvement
- Clearer Direction and Goal Setting
- Clarifies Roles and Responsibilities
- Enhances & Improves Board Governance
- Strengthens Team Bonds
- Refocuses on the Important Issues

The Benefits of Performance Evaluations and Assessments (cont'd)

- Greater Collaboration
- Organizational Achievements and Positive Impact
- Promotes Openness, Honesty and Trust
- Promotes a Sense of Accountability
- Ensures Alignment of Leadership & Board
- Creates a Culture of Success

Best Evaluation and Performance Review Practices

- Continuous Honest Feedback
- Self-Evaluations
- 360 Leadership Development
- Leadership & Board Online Assessments
- Creating a Culture of Continuous Learning & Performance Review
- Developing a Leadership and Board Development Program

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Executive Search · Nonprofit Leadership & Board Performance

WHEN HIGH PERFORMANCE EXECUTIVE LEADERSHIP
AND BOARD GOVERNANCE MATTER

CHIEF EXECUTIVE OFFICER ANNUAL PERFORMANCE EVALUATION

Dennis C. Miller
Executive Search • Nonprofit Leadership & Board Performance

CHIEF EXECUTIVE OFFICER
ANNUAL PERFORMANCE EVALUATION

(SAMPLE REPORT)

Annual reviews of the CEO's performance are an excellent way to identify and reward the CEO for their performance as well as communicate key areas of needed improvement to successfully guide the organization forward.

The Chief Executive Officer Performance Evaluation report will provide a summary of responses to **more than 25 questions** in seven categories:

⇒ Overall Organization Performance
⇒ Strategic Leadership
⇒ Board Relations
⇒ Community Relationships
⇒ Positive Brand Identity
⇒ Fiscal Stewardship
⇒ Culture of Philanthropy

We highly recommend that the Board of every nonprofit organization conduct this annual performance review of their CEO each year. In addition, we recommend that the Board include our DCM Talassure 360 Leadership Development System to include feedback from the CEO's direct reports on their perspective on his/her performance to enable the Board to have a better understanding of the CEO's relationship with the organization and his/her leadership team.

SAMPLE SUMMARY RESPONSES:

Establishes and communicates the organization's strategic vision and develops effective strategies for implementation.

8 responses

- Strongly Agree
- Agree
- Disagree
- Strongly Disagree
- Don't Know

37.5%
37.5%
25%
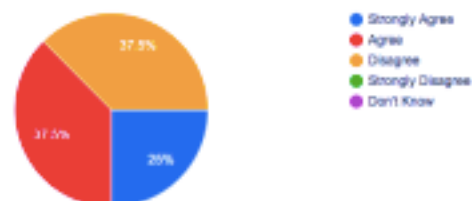
Works with the Governance Committee to ensure that the board is effectively engaging, recruiting, and educating all members of the board for carrying out their responsibilities.

8 responses

- Strongly Agree
- Agree
- Disagree
- Strongly Disagree
- Don't Know

50%
25%
25%

Serves as an effective spokesperson and represents the organization well to its constituents.

8 responses

- Strongly Agree
- Agree
- Disagree
- Strongly Disagree
- Don't Know

12.5%
25%
50%
12.5%
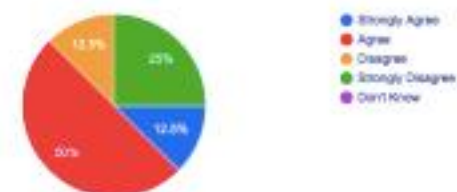
Develops a positive brand identity that motivates the entire staff, board, volunteers, and donors to feel pride in our work and to contribute together as a team.

8 responses

- Strongly Agree
- Agree
- Disagree
- Strongly Disagree
- Don't Know

12.5%
12.5%
37.5%
37.5%

Has implemented a culture of philanthropy where the CEO, board, and chief development officer each clearly understand their respective roles in raising money.

8 responses

- Strongly Agree
- Agree
- Disagree
- Strongly Disagree
- Don't Know

50%
50%

Talent Assessment (360) – 17 Skills

- Communications
  - ✓ Listens To Others
  - ✓ Processes Information
  - ✓ Communicates Effectively

- Teamwork
  - ✓ Manages The Team
  - ✓ Promotes Team Synergy
  - ✓ Facilitations Team Success

- Engagement
  - ✓ Recognizes Employees
  - ✓ Addresses Employee Needs

- Resourcefulness
  - ✓ Takes Initiative
  - ✓ Works Independently

- Decisiveness
  - ✓ Decision Making Ability
  - ✓ Exercises Judgement

- Leadership
  - ✓ Establishes Trust
  - ✓ Provides Direction
  - ✓ Delegates Responsibility

- Achievement
  - ✓ Pursues Objectives
  - ✓ Establishes Clear Expectations

TALEXES
TALENT SOLUTIONS
The Future of Workforce
Talent Solutions

»Talassure 360

Sarah Sample

Report Printed: **04/03/2017**
Survey Completed: **02/20/2017**

This report includes responses from:
Self, Boss, 6 Direct Reports, and 4 Peers

Self - Sarah Sample
Boss - Anna Doe

The Talassure 360 Leadership Development System

The purpose of the Talassure 360 Leadership Development System is to identify performance perceptions as viewed by certain groups of individuals who know and have had the opportunity to observe Sarah Sample in the work setting. This is accomplished by rating the performance of 62 Leadership Behaviors presented as survey items. The responses are compiled from different observers such as: Sarah Sample (Self), Boss, Direct Reports, and Peers.

By participating in this process the manager has conveyed to their team members that they are willing to consider their input, and apply that information to become a more effective leader. Listening and acting upon the input of their coworkers is a vital characteristic of the best managers. In this report, Sarah Sample will find invaluable information that can be used to improve performance.

This system is meant to encourage forward-thinking leadership while providing information for a clear, actionable plan for improvement. By surveying coworkers in a non-threatening manner and comparing that information to the survey responses submitted by Sarah, we can help provide a platform on which valuable feedback is given openly and honestly. Remember, perception is reality, and these perceptions of Sarah are important. Although hearing what they have to say might seem intimidating, remember that every ounce of information contained within this document is intended to assist Sarah Sample in achieving career goals.

Managers should evaluate the information contained within this document themselves, then review it with their boss. Explore each competency thoroughly, and evaluate the best course of action to mitigate future concerns. Managers, with their superior, should create a plan of improvement that takes the insights provided into consideration. The goal is for management to be excited at this point, as the opportunity for growth is enormous. The insights gained here will help Sarah Sample become more effective, more efficient, and more valuable to the organization.

This Report

The Leadership Behaviors are used to measure 17 Skills that yield success in most supervisory positions. These Skill Sets are grouped into 7 Leadership Competencies for an overall measurement of performance. Managers that generally score higher on these competencies are typically identified as more effective and successful leaders.

The Management Competencies

Communications	Listens carefully, summarizes and verifies. Expresses themselves clearly and considers pros and cons in reaching decisions.
Teamwork	Works to build rapport and consensus while collaborating with a team. Promotes team synergy while facilitating team success.
Engagement	Works to engage employees through recognition and addressing the needs of the workforce.
Resourcefulness	Displays confidence and effectiveness when taking initiative and works independently.
Decisiveness	Exercises sound judgement and seeks input for alternatives. Demonstrates effective decision-making ability.
Leadership	Builds a solid foundation for trust in leading by example. Clearly defines expectations in charting a course for success. Delegates and empowers appropriately.
Achievement	Pursues work focusing on results, setting realistic goals. Establishes clear expectations.

As you review this material, keep in mind that no one does everything equally well. Most people exhibit a range of abilities. Approached as a learning tool, this feedback can be a valuable first step toward increasing leadership effectiveness on the job.

This report is organized in such a fashion as to start with a very high overview, and then slowly work down to a detailed look at the responses about Sarah Sample. Each section is important and provides a unique view of the results. The sections are shown here in the order they are presented in this report to offer a quick view of the flow of information.

❯ Competency Overview

Results are graphically shown for all Leadership Competencies. This information is used to visually identify the alignment of scores between Sarah Sample and all of the other observers.

❯ Competency Summary

Displays the detailed results of the 7 Leadership Competencies. This allows you to see the results for the 7 Competencies, comparing the average scores of all respondent groups.

❯ Skills Alignment

Self and Boss agreement on the Skills identified as critical are shown and any skills with disparity in ratings are identified.

❯ Skill Set Analysis

A breakdown of the Skill Sets that create each competency. Skills are the level at which real improvements can be made. The results for the 17 Skills, comparing the average scores of all respondent groups, is displayed.

❯ Leadership Behavioral Analysis

This section lists the actual behaviors that were presented to the raters. Results for all 62 survey items consisting of the scores for all respondent groups are displayed. This can provide insight into the specific behaviors that may need to be addressed.

❯ Skill and Development Overview

All of the Skills are listed in rank order from highest to lowest. The lower scores should be the initial focus for development and could have the largest impact on performance improvement.

❯ Development Plan

This is the most critical component. Creating a plan for development is required to maximize the benefit of the 360 process. If there is no plan for improvement, then all of the effort up to this point could be wasted.

The Perception Rating Process

For each of the leadership behaviors, each rater reported their experience of observing Sarah Sample. Based on their observations they indicated the percentage of time they felt each behavior was displayed. There were six (6) possible choices. The range of rating was 1 to 5. The sixth choice was "N" (No Opportunity) which was selected when the rater was unable to observe the behavior and thus could not provide a meaningful response. The six ratings are described below:

Rating	N	1	2	3	4	5
Frequency	No Opportunity to Observe	Almost Never	Seldom	Sometimes	Usually	Almost Always
Percentage of the Time		< 10%	10 - 40%	41 - 60%	61 - 90%	> 90%

Competency Overview

This is a graphical representation of the ratings for Sarah Sample (Self) compared to the ratings of all the other observers for the 7 Competencies. Higher scores are further away from the center. Ideally you are looking for the scores of Sarah to be in alignment with the scores of all other observers. Higher scores on all competencies are preferred. Pay particular attention to any score differentials. A score disparity of 1 point or greater suggests a significant difference in perception between all of the other observers and Sarah Sample.

■ Self   ■ All Observers   ● Disparity (1.0 point or more)
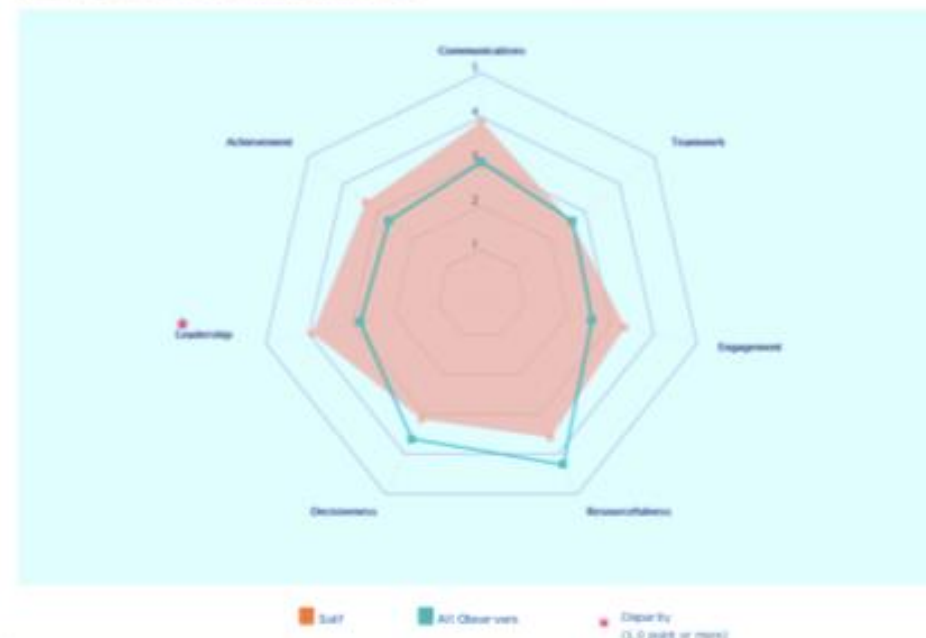
Talassure 360 Total Scores

Total Scores represent the average score for all of the 17 Skills within the 7 Competencies for both Self and all other observers. The differential is an important data point and should be as low as possible. If the differential is 1 point or greater, the perception of Sarah Sample varies a great deal from the other raters and suggests a need for a greater self-awareness.

Self (3.42)

All Observers (3.04)

Differential (-0.38)

The perceptions of each respondent group are presented here with the average ratings for each group. Note the differences between group ratings, especially if there is a difference of 1 point or more between groups. This suggests a significant difference in perception between the groups, which could indicate that Sarah performs differently when interacting with the individual respondent groups.

	1 Almost Never	2 Seldom	3 Sometimes	4 Usually	5 Almost Always

Communications — Listens carefully, summarizes and verifies. Expresses themselves clearly and considers pros and cons in reaching decisions.

Teamwork — Works to build rapport and consensus while collaborating with a team. Promotes team synergy while facilitating team success.

Engagement — Works to engage employees through recognition and addressing the needs of the workforce.

Resourcefulness — Displays confidence and effectiveness when taking initiative and works independently.

Decisiveness — Exercises sound judgement and seeks input for alternatives. Demonstrates effective decision-making ability.

Leadership — Builds a solid foundation for trust in leading by example. Clearly defines expectations in charting a course for success. Delegates and empowers appropriately.

Achievement — Pursues work focusing on results, setting realistic goals. Establishes clear expectations.

Legend: Self · Boss · Direct Reports · Peers · All Observers

Skills Alignment

Sarah and Boss selected 5 skills that were thought to be the most critical for success in the position and are identified below. If the same 5 Skills were selected, there will be 100% alignment. When there was no agreement on the Skills identified as critical, there is 0% alignment.

Unless the same behaviors have been identified as critical, there will be a real potential for disagreement on what is important and where efforts should be focused. As the alignment percentage decreases, it becomes a more important point to discuss and clarify the most critical aspects of the position. Also, noted below are any skills where the difference in the rating between Self and Boss are 1.5 or greater.

40% Alignment Between Self and Boss

Skill		
Listens To Others		B
Processes Information		
Communicates Effectively	⟲	B / S
Manages The Team		B
Promotes Team Synergy		
Facilitates Team Success		B / S
Recognizes Employees		
Addresses Employee Needs		
Takes Initiative		
Works Independently		S
Decision Making Ability		
Exercises Judgement		
Establishes Trust		S
Provides Direction	⟲	
Delegates Responsibility		S
Pursues Objectives		
Establishes Clear Expectations		B

⟲ Disparity (1.5 point or more) · B Self identified as critical · S Boss identified as critical

Skill Set Analysis

These Skills are the level at which real improvements can be made. The results for the 17 Skills and their definitions are displayed along with the average score for each group of raters. The scores for each group when compared to the other groups should be considered carefully. Scores with a difference of 1.5 points or more could indicate a misunderstanding of the job function between respondent groups. Any skill that has an All Observer score of 2.0 or lower is identified as a possible Area for Development and a score of 4.0 or higher is marked as an Area of Strength. For convenience, the skills that were selected as critical are also indicated.

	1	2	3	4	5
	Almost Never	Seldom	Sometimes	Usually	Almost Always

Communications

Listens To Others

Seeks input creating a comfortable environment for expression. Listens openly and carefully with no interruptions. Summarizes and verifies understanding.

Processes Information

Identifies key points considering pros and cons in the long-range effect of decisions. Reaches logical decisions.

Communicates Effectively

Expresses self clearly, both in writing and speaking. Speaks in a thorough, direct manner, and readily shares information with others.

Teamwork

Manages The Team

Builds rapport and develops relationships. Builds consensus by engaging team members.

Promotes Team Synergy

Avoids blaming others. Encourages team member input and takes personal responsibility for resulting conflict.

Facilitates Team Success

Reviews team performance while keeping team members informed. Reinforces the need to meet or exceed expectations.

Engagement

Recognizes Employees

Openly acknowledges employees for their importance to the company's success. Rewards employees for performance, ideas, and suggestions.

Addresses Employee Needs

Allows for development activities, communicates opportunities, and remains approachable at all times.

	1	2	3	4	5
	Almost Never	Seldom	Sometimes	Usually	Almost Always

Resourcefulness

Takes Initiative

Approaches new tasks positively, exhibits confidence, and is effective in workforce utilization.

Works Independently

Needs minimal direction and support. Brings closure by reaching resolution to issues.

Decisiveness

Decision Making Ability

Takes initiative, assumes risk, assesses alternatives, and takes responsibility in decision making.

Exercises Judgement

Seeks input and uses sound judgement and instinct while making decisions in a timely fashion.

Leadership

Establishes Trust

Is honest, demonstrates strong ethics, keeps promises, and can be trusted.

Provides Direction

Establishes manageable workloads and makes expectations clear while keeping focus on targets in implementing details.

Delegates Responsibility

Knows when to delegate. Delegates the right jobs, giving others authorization for completion.

Achievement

Pursues Objectives

Establishes realistic goals while setting appropriate timelines. Pursues work with drive, going beyond the routine demands of the job.

Establishes Clear Expectations

Sets clear expectations and scope of work that encourage and motivate employee commitment.

	1	2	3	4	5
	Almost Never	Seldom	Sometimes	Usually	Almost Always

Legend:

- (S) Self identified as critical
- (B) Boss identified as critical
- ⟲ Disparity between Self & Boss (1.5 points or more)
- ✓ Area of Strength (4 or above)
- ⚠ Area for Development (2 or below)
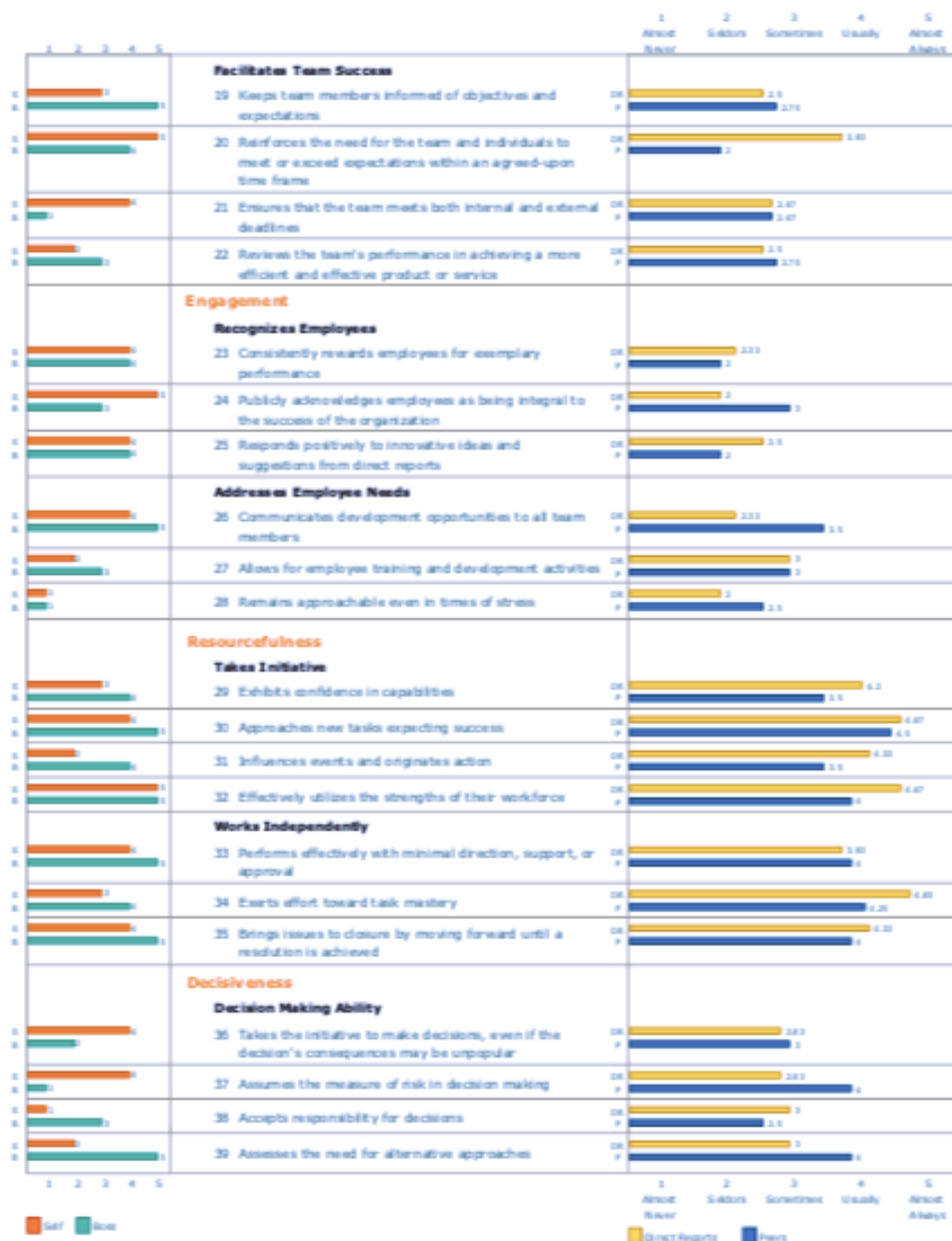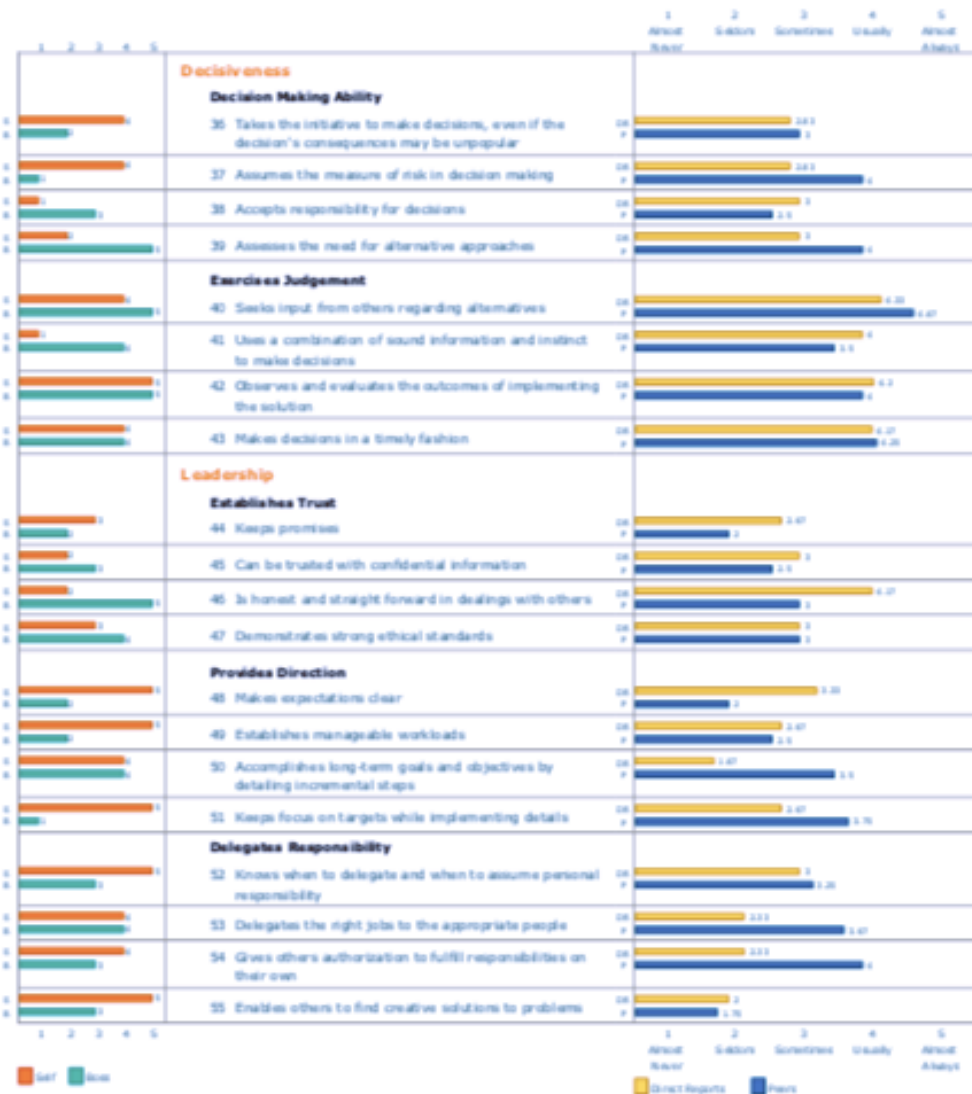- ▮ Self
- ▮ Direct Reports
- ▮ Peer
- ▮ Boss
- ▮ All Observers

Leadership Behavioral Analysis

The ratings for each individual behavioral item are shown for each respondent group. These behaviors are the foundation for overall performance. This can provide insight into the specific behaviors that may need to be addressed. Pay close attention to those behaviors with a wide variance, since they may have had an impact on the average All Observers score for the Skill Set and Competency. The ratings for Self and Boss are their actual ratings, while the scores for the other groups are an average of that groups ratings.

Communications

Listens To Others
1. Solicits input from others
2. Creates a comfortable environment for airing concerns
3. Listens to all points of view with an open mind
4. Listens carefully without interrupting

Processes Information
5. Identifies the main points of an issue
6. Considers the pros and cons when making decisions
7. Reaches logical, clear conclusions
8. Asks questions to clarify what was heard

Communicates Effectively
9. Expresses thoughts and ideas clearly in writing
10. Covers an issue in depth without overdoing it
11. Communicates in a direct manner
12. Makes current job-related information available to others

Teamwork

Manages The Team
13. Builds rapport and establishes constructive relationships by actively seeking to understand others
14. Builds consensus by actively engaging all interested parties in decision-making and problem-solving
15. Understands and appreciates different perspectives and viewpoints

Promotes Team Synergy
16. Speaks positively about the team and does not blame others
17. Encourages views from others and appreciates other team members' perspective
18. Takes personal responsibility for resolving team conflicts

Self Boss
Direct Reports Peers

Facilitates Team Success
19. Keeps team members informed of objectives and expectations
20. Reinforces the need for the team and individuals to meet or exceed expectations within an agreed-upon time frame
21. Ensures that the team meets both internal and external deadlines
22. Reviews the team's performance in achieving a more efficient and effective product or service

Engagement

Recognizes Employees
23. Consistently rewards employees for exemplary performance
24. Publicly acknowledges employees as being integral to the success of the organization
25. Responds positively to innovative ideas and suggestions from direct reports

Addresses Employee Needs
26. Communicates development opportunities to all team members
27. Allows for employee training and development activities
28. Remains approachable even in times of stress

Resourcefulness

Takes Initiative
29. Exhibits confidence in capabilities
30. Approaches new tasks expecting success
31. Influences events and originates action
32. Effectively utilizes the strengths of their workforce

Works Independently
33. Performs effectively with minimal direction, support, or approval
34. Exerts effort toward task mastery
35. Brings issues to closure by moving forward until a resolution is achieved

Decisiveness

Decision Making Ability
36. Takes the initiative to make decisions, even if the decision's consequences may be unpopular
37. Assumes the measure of risk in decision making
38. Accepts responsibility for decisions
39. Assesses the need for alternative approaches

Self Boss
Direct Reports Peers

1 2 3 4 5   1 2 3 4 5
Almost   Seldom   Sometimes   Usually   Almost
Never   Always

Decisiveness

Decision Making Ability

36 Takes the initiative to make decisions, even if the decision's consequences may be unpopular

37 Assumes the measure of risk in decision making

38 Accepts responsibility for decisions

39 Assesses the need for alternative approaches

Exercises Judgement

40 Seeks input from others regarding alternatives

41 Uses a combination of sound information and instinct to make decisions

42 Observes and evaluates the outcomes of implementing the solution

43 Makes decisions in a timely fashion

Leadership

Establishes Trust

44 Keeps promises

45 Can be trusted with confidential information

46 Is honest and straight forward in dealings with others

47 Demonstrates strong ethical standards

Provides Direction

48 Makes expectations clear

49 Establishes manageable workloads

50 Accomplishes long-term goals and objectives by detailing incremental steps

51 Keeps focus on targets while implementing details

Delegates Responsibility

52 Knows when to delegate and when to assume personal responsibility

53 Delegates the right jobs to the appropriate people

54 Gives others authorization to fulfill responsibilities on their own

55 Enables others to find creative solutions to problems

Self   Boss

Direct Reports   Peers

Achievement

Pursues Objectives

56 Pursues work with energy, drive, and a strong focus on results

57 Goes beyond the routine demands of the job

58 Establishes and maintains challenging, yet realistic, work goals

59 Sets timelines for the achievement of goals

Establishes Clear Expectations

60 Defines expectations and potential positive and negative outcomes

61 Establishes a clear plan and scope of work

62 Sets deadlines and performance benchmarks that motivate and encourage employee commitment

Self   Boss

Direct Reports   Peers

Skill and Development Overview

This page displays all 17 Skills listed in rank order from highest to lowest based on All Observers averaged scores. The Self ratings for each skill is also shown. Those that were rated with the highest average scores may be potential strengths. Often, honing your strengths is an excellent way to begin improving your skills. Skills with a rating of 4.0 or higher will be identified as a Strength. Lower scores should be a focus for development. Also, note the Skills identified as critical to success. Skills with low scores, combined with those selected as critical, may be identified as skills needing improvement and could have the largest impact on performance development.

	1 Almost Never	2 Seldom	3 Sometimes	4 Usually	5 Almost Always

Skill	Score	
(S) Works Independently	4.28	Strength
Takes Initiative	4.26	Strength
Exercises Judgement	4.17	Strength
Processes Information	3.2	
Decision Making Ability	3.07	
(S) Establishes Trust	3.02	
(B)(S) Communicates Effectively	2.88	
(B) Listens To Others	2.88	
(B)(S) Facilitates Team Success	2.79	Improvement Needed
(S) Delegates Responsibility	2.74	
Pursues Objectives	2.7	
Promotes Team Synergy	2.7	
Addresses Employee Needs	2.69	
Provides Direction	2.68	
(B) Establishes Clear Expectations	2.64	
(B) Manages The Team	2.47	
Recognizes Employees	2.45	Improvement Needed

Legend:
- (S) Self identified as critical — ■ All Observers
- (B) Boss identified as critical — ■ Self

Comments

All respondents (except Self) were presented with the opportunity to give written comments for each competency. They were encouraged to provide their feedback in an effort to assist Sarah to better understand some of the scores that were given. This information should play an important part in understanding the perception of the raters regarding the performance of Robert California .

If a competency is not listed, there were no comments given. Comments by the Boss are noted separately; comments by all other respondents are listed under Respondent Groups.

Communications

Boss
- Sarah needs to improve in this area. She's not clearly expressing the challenges that are keeping her from accomplishing her goals.

Respondent Groups
- I always think she is paying attention to the things I tell her, but find out later she can't remember a thing. She often interrupts me when I'm talking.

Teamwork

Respondent Groups
- It seems like anytime we do things as a team, Sarah won't let the team members contribute and she takes all the praise for success.

Resourcefulness

Boss
- Sarah is always right on top of things. She often finds new and creative ways to accomplish the goals that are set.

Respondent Groups
- I love her out of the box way of thinking.
- I've learned a lot watching her pick apart problems and come up with new ways of addressing them.

Development Plan

Planning is the most integral element of personal development. You cannot leave personal development to chance! When creating a Personal Development Plan, make sure to spend time connecting each identified area for improvement to the overall function of the business. Include actions that can be performed on the job daily. In this way, leaders will be more likely to see the value in each proposed change, and will find it easier to follow through with planned methods for improvement.

It's just human nature that people play to their strengths. We recognize and value certain skills and traits within ourselves. Leaders are no different. In their experience, they've gained valuable knowledge and skills that they can apply to a variety of situations - that's why they're the leaders. But there are times when a leader's strengths don't encompass the full scope of the requirements of the job. When you're confronted with a difficult task, or a skill in which you are not proficient is required of you, you must regard it as an opportunity for development. Using the information in this report you should determine what is necessary to improve a skill or behavior, and then get it done.

Next, there must be a Personal Development Plan. This plan shouldn't be overcomplicated. More often than not, the best course of action for both personal and professional development is clear and easily executable. The most significant growth opportunities take place on the job, and are under the leader's total control. To begin this process, use the M-L-B Method.

MORE - Do MORE of these

Think about the behaviors that have been identified as strengths throughout the course of the survey. These are things that you should ensure happen more often in your daily routine. This is the easiest of the steps because you're already good at these things, so no adjustments will have to be made.

LESS - Do LESS of these

Analyzing this report, you should have recognized behaviors that don't bring about the desired outcomes. In order to improve your performance in those areas, make an effort to minimize these behaviors. This will require you to do less of the things that support each behavior.

BEGIN - BEGIN doing these

This survey has revealed things you could be doing to enhance your effectiveness. It is pivotal that you begin doing these things to develop new behaviors in addition to modifying your current behaviors. As you gain knowledge and acquire ideas for better leadership performance, ensure that these behaviors become habits.

Creating a Personal Development Plan

The following process is an outline to take the information presented in this report and create your own Personal Development Plan to achieve better performance.

Step 1 - Goals

Using the SMART approach, set goals that are specific, measurable, attainable, realistic, and timely. The key is figuring out how to leverage the information provided to make the quickest impact on job performance.

Step 2 - Action Items

Take the time to determine exactly what must be done to achieve set goals. Action items could include:

* Identify a coach to assist throughout the process
* Read subject material that will assist in achieving your goals
* Leverage online training resources
* Select an individual you trust to hold you accountable
* Set aside weekly time for self-evaluation

Step 3 - Milestones

Identify milestones in the developmental process. This creates ongoing motivation, as well as providing a means to track results. This is imperative to achieving success. Remember, an elephant must be eaten a bite at a time.

Step 4 - The Plan

Formulate a realistic schedule for your milestones and action items. Behavior takes time to modify, and skills take time to master. Consider strengths and areas for improvement that have been identified, and prioritize action items according to the MLB system.

Step 5 - Execution

Make it happen! Planning without execution is a waste of time. This process requires momentum, and momentum requires movement. Goals have been set, milestones and action items have been identified, and a plan has been put in place. Now is the time to put that plan into action.

Step 6 - Schedule Next 360

After all of the above is in place, schedule the next 360. Without a comparison to the initial results, there will be no way to identify changes in perception. Remember that the ultimate goal of the process is improving managerial effectiveness, and there is no better measure than the perceptions of coworkers.

Dennis C. Miller
Executive Search · Nonprofit Leadership & Board Performance

WHEN HIGH PERFORMANCE EXECUTIVE LEADERSHIP AND BOARD GOVERNANCE MATTER

EXECUTIVE LEADERSHIP AND BOARD GOVERNANCE PARTNERSHIP ONLINE ASSESSMENT SURVEY

Dennis C. Miller
Executive Search · Nonprofit Leadership & Board Performance

Dennis C. Miller
Executive Search · Nonprofit Leadership & Board Performance

EXECUTIVE LEADERSHIP AND BOARD GOVERNANCE PARTNERSHIP ONLINE ASSESSMENT SURVEY

(SAMPLE REPORT)

The Executive Leadership & Board Governance Partnership Online Assessment Survey report will provide a summary of responses to **more than 50 questions** in eight categories:

⇒ Mission, Vision, Values and Culture
⇒ Strategic Goals
⇒ Board and CEO Partnership
⇒ Executive Leadership
⇒ Board Governance
⇒ Impactful Programs and Services
⇒ Positive Brand Identity
⇒ Philanthropy

While most board assessment surveys evaluate board performance only, the Dennis C. Miller survey will move your organization toward improved collaboration between CEO, the leadership team, and the board.

The report will also include recommendations for making any needed improvements to better serve your mission.

SAMPLE SUMMARY RESPONSES:

Our organization has an inspirational vision statement that clearly articulates a future direction that is ambitious, realistic, credible, and measurable.

10 responses

- Strongly Agree
- Agree
- Disagree
- Strongly Disagree
- Don't Know

Our organization's leadership, board governance, programs and services, brand identity and philanthropy are all strategically aligned and committed to achieving one goal: our strategic vision.

10 responses

- Strongly Agree
- Agree
- Disagree
- Strongly Disagree
- Don't Know

The CEO has demonstrated the skills and competencies of being a visionary thinker, relationship builder, collaborator, and inspirational motivator.

10 responses

- Strongly Agree
- Agree
- Disagree
- Strongly Disagree
- Don't Know

The Board Chair seeks to build consensus behind the scenes with other board members prior to requesting a vote to approve major decisions at board meetings.

10 responses

- Strongly Agree
- Agree
- Disagree
- Strongly Disagree
- Don't Know

Our organization has a plan to identify and develop new leaders for our organization as part of a comprehensive leadership succession plan that addresses all levels of management.

10 responses
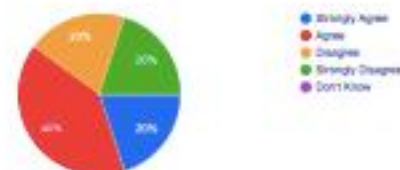
- Strongly Agree
- Agree
- Disagree
- Strongly Disagree
- Don't Know

ASSESSMENTS AND EVALUATIONS

EXECUTIVE LEADERSHIP & BOARD GOVERNANCE ONLINE ASSESSMENT SURVEY

This online survey will identify how well your executive leadership team and Board members work together as true partners in sustaining your social mission and achieving your strategic vision

You will receive a final report of findings and recommendations on the final topics including a one-hour virtual consultation:

- *Mission, Vision, Values and Culture*
- *Strategic Goals*
- *Board and CEO Partnership*
- *Impactful Programs and Services*
- *Positive Brand Identity*
- *Philanthropy*

Ideal for board retreats, strategic planning and annual organizational performance evaluations

➢ **ONLY $975**

ANNUAL CEO PERFORMANCE EVALUATION

The goal of the annual Chief Executive Officer performance review is to recognize how well the executive is performing in their job and to identify any needed improvements. The annual CEO evaluation review also includes the CEO Self-Evaluation survey as well. All members of your Board are encouraged to participate in the CEO evaluation.*

The DCM Associates Chief Executive Officer Performance Evaluation includes the following topics for assessing the annual review of the CEO:

- *Overall Organizational Performance*
- *Strategic Leadership*
- *Board Relations*
- *Community Relationships*
- *Positive Brand Identity*
- *Fiscal Stewardship*
- *Culture of Philanthropy*

➢ **ONLY $975**

WHEN PURCHASED TOGETHER ONLY $1450 - SAVE $500

* *We recommend that the Board include our 360 Leadership Development System to include feedback from the CEO's direct reports on their perspective of their performance to enable the Board to have a better understanding of the CEO's relationship with the organization and his/her leadership team.*

ANNUAL LEADERSHIP TEAM MEMBER PERFORMANCE EVALUATION

Annual reviews of individual members of the Executive Leadership team member's performance are an excellent way as well to identify areas of strengths as well as communicate any key areas of needed improvement. Our individual executive leadership team member's performance evaluation also includes their self-evaluation survey.

➢ **ONLY $250 PER INDIVIDUAL EXECUTIVE TEAM MEMBER – INCLUDES THEIR SELF-EVALUATION AS WELL**
➢ **ONLY $1200 FOR UP TO SIX TEAM MEMBERS**

DCM RECOMMENDS INCLUDING OUR 360 LEADERSHIP DEVELOPMENT FOR EACH INDIVIDUAL PERFORMANCE EVALUATION UP TO 15 COLLEAGUES AND PEERS FEEDBACK FOR EACH EXECUTIVE

THE 360 LEADERSHIP DEVELOPMENT SYSTEM

The DCM 360 Leadership Development System are a non-threatening way to identify how executives are perceived by those they work with - their boss, direct reports, and peers on the leadership team. Feedback to the executive is given freely and honestly with the focus on development by rating performance of 62 leadership behaviors. This report includes a personalized debrief and the formulation of a personalized leadership development plan for each member of your team. The insights gained from the 360 Leadership Development System is to promote professional development to enable the leader to become more effective and efficient member of the team.

Leadership Competencies assessed include:

- *Communications*
- *Engagement*
- *Decisiveness*
- *Achievement*
- *Teamwork*
- *Resourcefulness*
- *Leadership*

> ## ONLY $375 PER EXECUTIVE

LEADERSHIP ASSESSMENT & DEVELOPMENT

The DCM Leadership Assessment measures a candidate's behavioral traits, cognitive abilities, and professional interests. This assessment is helpful when considering upper-level leadership openings and promotions. It provides information which reflects the responses provided by the prospective executive leadership candidate or a current team member when completing the assessment. The report will also provide your organization with the individual's abilities and personality traits and how they are likely to interact with other members of the team.

The DCM Leadership Assessment features the TalassureMX which measures the following core Leadership and personality traits:

- *Reasoning Ability*
- *Competitiveness*
- *Sense of Urgency*
- *Take Charge*
- *Manageability*
- *People Contact*
- *Attitude*

> ## ONLY $275 PER EXECUTIVE

ONLINE BOARD AND LEADERSHIP COURSES

INVEST IN YOUR NONPROFIT BOARD MEMBERS AND EXECUTIVE LEADERSHIP TEAM'S SUCCESS

Most nonprofit organizations, business and trade associations have great causes and powerful missions that are being advanced through the efforts of dedicated professionals, yet far too many organizations still struggle to achieve the level of excellence their mission requires.

DCM's online courses will enable your Board members and leadership team to learn the skills, competencies and self-confidence required to become a high performing nonprofit organization with those you serve becoming the ultimate beneficiary. You can take these one-hour online courses from the convenience of your home, office or mobile app.

HOW TO BECOME A HIGH PERFORMING NONPROFIT BOARD

Topics covered include:

- *The Four Stages of Board Governance*
- *The Characteristics of High Performing Boards*
- *The Board & CEO Partnership*
- *The Board's Role in Strategic Planning*
- *Board Leadership Succession*
- *How to Engage the Board in Philanthropy*
- *Dealing with Difficult Board Behavior*
- *Measuring the Board's Annual Performance*

HOW TO BECOME A HIGH PERFORMING NONPROFIT EXECUTIVE LEADERSHIP TEAM

Topics covered include:

- *Visionary Thinker*
- *Emotional Intelligence*
- *Entrepreneurial Spirit*
- *The CEO's Role in Philanthropy*
- *Positive Brand Builder*
- *Strategic Collaboration*
- *Leadership Development*
- *Inspirational Motivator*

> ## EACH ONLINE COURSE ONLY $975 TO REGISTER UP TO 25 PEOPLE FOR OUR ONE-YEAR LICENSE
> ## - PURCHASE BOTH COURSES ONLY $1450 – SAVE $500

ORGANIZATIONAL LEADERSHIP DEVELOPMENT PROGRAMS

DCM's experienced national nonprofit leadership experts will assess and develop your organization's leadership development programs through our 5-Stage Process:

1. *Conduct an initial organizational wide assessment of the current strategy for identifying and developing leaders from within your organization.*
2. *Identify the competencies, skills and personal attributes your leadership team members will need to develop to be successful.*
3. *Implement a series of pre-recorded sessions on leadership competencies: Inspirational leadership – emotional intelligence – relationship building – creating a positive work culture.*
4. *Provide an online course to increase leadership skills and effective team building: strategic planning – fundraising – building a brand identity – impactful programs and services, etc.*
5. *Create a series of live interactive sessions on a wide range of topics – DE&I - learning from adversity – the concept of strategic alignment – leadership effectiveness, etc.*

In addition, DCM has assessment and evaluation tools to help identify each leader's core personality and leadership traits, a 360 leadership development system, annual evaluation and self-evaluation tools to create individual leadership development plans.

DCM in conjunction with your leadership team, will review the progress of your leadership development program and make final recommendations to develop your program. Our leadership development program can range from 4 months to 6 months depending on the number of participants and courses selected.

These services may be purchased as a package or selective components may be purchased to enhance your current leadership development program.

> ## FEES RANGE FROM $4500 TO $9500 BASED UPON THE NUMBER OF PARTICIPANTS AND ADDITIONAL OPTIONS SELECTED.

EXECUTIVE LEADERSHIP AND BOARD COACHING SERVICES

DCM'S executive leadership coaching services are specifically designed for nonprofit leaders and board members. Our flexible coaching services are equally valuable for the emerging nonprofit leaders, mid-career individuals and current executive leaders and board members. Whether leaders are looking to build culture, improve efficacy or lead new strategic initiatives, DCM's coaching team provides excellent support and capacity building to support every level of leadership in leading their organizations successfully forward.

Our team of national experts has decades of experience and successful outcomes. DCM is recognized as thought leaders who are effective in helping organizations to recruit and develop great leaders. At DCM, we realize that each situation and the needs in leadership are different. For that reason, we encourage you to contact us for a confidential free consultation to discuss how our coaching services can help you and your leaders achieve the great results and personal satisfaction they are seeking.

CONTACT DCM TO DISCUSS SPECIFIC LEADERSHIP COACHING NEEDS AND AFFORDABLE PROFESSIONAL FEES.

CERTIFICATE PROGRAMS

DCM offers three well-respected leadership and board certificate programs each Fall and Spring

- *Transformational Nonprofit Emerging Leadership Certificate*
- *Nonprofit Board Governance Certificate*

➢ **$975 PER REGISTRANT**

FOR MORE INFORMATION VISIT WWW.DCM-ASSOCIATES.COM

DCM's Annual CEO Performance Evaluation including the CEO Self-Evaluation survey, the Executive Leadership and Board Governance Online Assessment Survey and the DCM 360 Leadership Development Survey create a comprehensive review and communication tool for the Board and CEO. The feedback provided from the assessment and evaluation tools was insightful and validating. The tools provide a comprehensive review of management competencies, leadership behavior, and progress toward meeting strategic organizational goals by incorporating the perspective of the board members and direct reports, compared to your own perception. I highly recommend these tools and the process supported by Dennis and his team!

Anne Ogden, Executive Director
CTC Academy

The DCM Executive Leadership & Board Governance Assessment Survey and their CEO Annual Performance Evaluation tools enabled our board and CEO to create a baseline evaluation of our current performance and helped us develop a specific plan of action going forward to ensure the sustainability of our mission. I highly recommend them.

Robert Kley, Chair of the Board
Monarch Housing Associates

One of the most important responsibilities of a Governing Board is the annual assessment of the Chief Executive Officer to whom operations of an organization are delegated. Not for profit organizations with rotating officers on the board have a daunting task to standardize the evaluation. To make the process objective, and to engage all officers of the Board, takes much effort and time. CAHME determined to outsource the initial part of the process in 2020-21. DCM assists in standardizing the Performance Evaluation survey to make it timely and more efficient. DCM created and performed a Board survey with elements of our prior assessments. The survey was completed much earlier in the past with the entire participation of the Board. DCM also facilitated the CEO self-evaluation and summarized all results. I am extremely pleased that the Board chose DCM to assist CAHME in the Performance Evaluation survey and assessment process. I highly recommend that other organizations consider DCM.

Dolores G. Clement, DrPH, FACHE
Chairperson
Commission on Accreditation of Healthcare Management Education

Dennis Miller and his team developed an extremely valuable assessment of our governing board at the Santa Fe Recovery Center. His perceptions and insights resulted in actional recommendations our board understood, embraced, and implemented. Those recommendations led to more effective oversight enabling us to become a more effective substance use disorder recovery organization. Furthermore, Allan Weisberg of DCM conducted 360 evaluations of both the board chair and CEO—one of the recommendations of Dennis's assessment. These evaluations were comprehensive, they effectively collected the perspectives of the many people who participate in our organization's success. Allan's insights into the meaning of the 360 results enabled me as board chair to develop an improvement plan that's paying great dividends.

Thomas Starke, Board Chair
Santa Fe Recovery Center

I recently completed the training "How to Become a High Performing Nonprofit Board". This training covered the characteristics and obstacles of being a high performing board. Yes, this training should be an essential component of the new board member orientation and can be very useful for long serving board members. The key topics can lead to a very rich discussion and learning by board members. I also believe this training is essential for Chief Executive Officers that report to the board - whether you are just beginning in your job, or a veteran. I look forward to utilizing the wealth of resources Dennis C. Miller has to offer to nonprofit leaders to move our agency mission forward.

Laura Heintz, Psy.D.
CEO - Stanford Sierra Youth & Families

Wishing I had the benefit of this digestible yet comprehensive governance overview when I began working with boards. Dennis' online courses provides organizational defining fundamentals that shouldn't be left to figure out "on the job" or by stringing together issue centric best practice sessions more typically offered in conferences. The clarity and ease of use makes this resource valuable to the newer practitioner, to the seasoned practitioner as a refresher, or to the best intentioned boards that have simply lost their way and need to get back to the center.

David L. Flood
AHP's 2018 Si Seymour Award Recipient for his Distinguished Leadership in the Healthcare Philanthropy Community

Dennis Miller has created a wonderfully informative and instructive resource for nonprofit executives and boards in his new online courses "How to Become a High Performing Nonprofit Board" and "How to Become a High Performing Nonprofit Executive Leadership Team. The courses are full of great information and tips that will assist executives and board members at all levels of their board and leadership development. The videos are engaging and matched well with a companion handbook I found the questions at the end of each module to be excellent for both stimulating discussion as well as a sound exercise in determining the functioning of the board and CEO. Many thanks to Dennis for sharing his sound knowledge and experience!

Allison Blake, PhD MSW, Chief Executive Officer
Child and Family Agency of Southeastern Connecticut

Dennis Miller has done it again - his own version of pushing a Board from good to great. In his new series of "How to Become a High Performing Board©", Dennis illustrates some of the most basic and strong practices needed by all non-profit Boards. Whether an experienced Board Chair or newer Board member, this is a valuable tool in helping to transition your Board to greater philanthropy opportunities, as well as the overall importance of Board impact on your organization. The success of your Board - and its leadership to the organization's mission - is critical. Dennis' focus on Leadership Development, Board Governance, Philanthropy and Succession Planning is a true win for all non-profit Boards.

Todd Shellenberger, Vice President of Development
Make-A-Wish America

WORKSHOPS ★ WEBINARS ★ RETREATS ★ SPEAKERS

Click here to see what
Stephen N. Lawrence, PhD, MPA - Chair, Council on Trustees / Bonnie Brae
has to say about us.

Click here to go to www.dcm-associates.com and scroll down to our client videos section to see what they have to say about us.

TO LEARN MORE ABOUT HOW DCM'S TEAM OF EXPERIENCED AND DEDICATED NONPROFIT LEADERSHIP EXPERTS CAN ASSIST YOU AND YOUR ORGANIZATION, PLEASE VISIT WWW.DCM-ASSOCIATES.COM

Please feel free to schedule a free no-obligation consultation with Dennis C. Miller, Founder & Chairman, at dennis.miller@dcm-associates.com to schedule a free conference call or contact him at 1-866-DCM-6222.

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