

Aging Together

**2023 EXECUTIVE DIRECTOR PERFORMANCE EVALUATION
For the Period of July 1, 2022 to June 30, 2023**

**2023
EXECUTIVE DIRECTOR PERFORMANCE EVALUATION**

PERFORMANCE AREAS	RATINGS/COMMENTS
<p>1. <u>Provides Strategic Planning and Direction</u></p> <p>Works with the Board, board committees, and County Teams to effectively coordinate the implementation of strategic plan and goals; monitor effectiveness in meeting objectives and work with board and teams to modify as necessary.</p>	<p>Rating (fill in circle): <input type="checkbox"/> No Opinion</p> <p style="text-align: center;"> 0-----0-----0-----0-----0-----0 4 3 2 1 Total – 3.9 </p> <p>Comments:</p> <ol style="list-style-type: none"> 1. No comment. 2. 4., Ellen utilizes the workplan based off of the strategic plan, effectively in her work. 3. 4, No comment. 4. 4, Accomplishment include: constantly updated strategic plan, working with the board by providing documents well in advance, coordinates with local, county, regional and state level organization non-profits and Chamber of Commerce, PATH, and leads efforts on coordination between multiple groups on senior services. 5. 3.5, the change in reporting to the Board using the strategic plan has been very helpful and gives me a better sense of where Ellen’s time is spent. 6. 3.5, Ongoing review of work plan and PPA Committee reports reflects continual focus on mission and strategic plan objectives. 7. 4.0, Focused leadership.

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2. Provides Effective Leadership

Communicates and gains commitment to AT objectives and direction among Board, and provides effective leadership with community partners, stakeholders, and with supervision of staff to promote AT goals in the community.

Rating (fill in circle):

No Opinion

O-----O-----O-----O-----O-----O-----O-----O

4

3

2

1

Total – 3.7

Comments:

1. 4, No comment.
2. 4., Ellen has established herself as a trusted community leader and is seen as the voice of Aging Together, as she promotes the AT goals in all five communities.
3. 4, No comment.
4. 4, Leads in planning the annual dementia conference, monthly Senior Services Collaborative, 5 over 50 reviews and celebrations, Senior Expos, has recruited and leads a very effective and staff in accomplishing amazing Aging Together functions, serves as an outstanding community leader and advocate for seniors.
5. 3, I believe that Ellen is well respected by partners and stakeholders. There have been some missteps with staff (hires that did not work out, primarily) that give me some minor concerns.
6. 3, Ellen handled some turnover and personnel challenges during the period; maintained a strong and effective staff team.
7. 4.0, Regional subject matter expert on aging issues.

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<p>3. <u>Communicates Effectively</u></p> <p>Provides the Board, board committees and county teams with appropriate and timely communication. Is able to use written and oral communication skills effectively in fulfilling AT’s mission in the community.</p>	<p>Rating (fill in circle): <input type="checkbox"/> No Opinion</p> <p style="text-align: center;"> O-----O-----O-----O-----O-----O-----O 4 3 2 1 Total – 3.9 </p> <p>Comments:</p> <ol style="list-style-type: none"> 1. 4, No comment. 2. 4, Ellen has great communication skills, done masterfully using all forms. Most importantly, with our funders and citizens. 3. 4, No comment. 4. 4. Regularly sends articles to the Culpeper paper, does an excellent newsletter to all persons who have signed up with Aging Together, Keeps the Board informed of all efforts, attends and actively participates in Board meetings, committee meetings and with other non-profits both regional and local. 5. 4, Communication is a very strong aspect of Ellen’s work and her leadership for Aging Together. I appreciate that this is an area where she also identified importance of staff capacity with this knowledge. 6. 3.5, Ellen positively and effectively promotes the AT Mission on multiple levels. 7. 4.0, Excellent communication orally and in writing!
<p><u>Rating Key:</u></p> <p>4 = Outstanding (consistently exceeds standards) 3 = Highly Effective (often exceeds standards)</p>	
<p>2 = Good (meets standard) 1 = Needs Improvement</p>	

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<p>4. <u>Plans and Implements AT Programs/Initiatives</u></p> <p>Assures that program priorities established by the board and strategic plan are implemented effectively. Recommends new programmatic directions in response to community needs and county teams and concerns. Demonstrates flexibility and adaptability in response to change</p>	<p>Rating (fill in circle): <input type="checkbox"/> No Opinion</p> <p style="text-align: center;"> O-----O-----O-----O-----O-----O-----O 4 3 2 1 Total – 3.9 </p> <p>Comments:</p> <ol style="list-style-type: none"> 1. 4, No comment. 2. 4., Ellen is adept at change management and gives good insight and suggestions to the board. 3. 4., No comment. 4. 4, Very active in continually seeking out new initiatives to aid seniors in Central and Northern Virginia. Makes excellent use of all opportunities for coordinating and introducing new initiatives for seniors. 5. 3.5, Very responsive to community partners and changing needs of the region. 6. 4., Thanks to Ellen's leadership, AT has been increasingly recognized as a key facilitator in the region for the resource guide, dementia initiatives, caregiver supports, etc. 7. 4.0, no comment
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<p>5. <u>Provides Effective Leadership for Financial Development</u></p> <p>Works with the Board and committee for development, ongoing monitoring and implementation of fundraising plan. Work with board and committee to develop annual budget, to manage spending and to develop sources of income to implement AT's priorities and to assure AT sustainability. Identify, prepare and submit relevant grant applications to address Aging Together priorities</p>	<p>Rating (fill in circle): <input type="checkbox"/> No Opinion</p> <p style="text-align: center;"> O-----O-----O-----O-----O-----O-----O 4 3 2 1 Total – 3.4 </p> <p>Comments:</p> <ol style="list-style-type: none"> 1. 4, No comment. 2. 3, Ellen's understanding for the financial side of being a director has improved over last year and she is more adept at figuring out issues and catching problems earlier. Ellen does a great job at fundraising and writing grants and she as a wonderful relationship with PATH and other funders. 3. 4, No comment. 4. 3.5, Has demonstrated improved understanding and implementation of budgetary plans and executive over the past year. 5. 2.5, Ellen remains reliant on the Board (treasurer) for much of this work. That is okay provided we have the knowledge and capacity to maintain that over the long-term. 6. 3., Ellen collaborates effectively with the Advancement Committee and Board Treasurer to monitor fiscal activity and ensure financial viability. 7. 4.0, no comment.
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<p>6. <u>Provides Effective External Representation</u></p> <p>Sets, maintains and improves the image of AT and fosters community relations. Ensures optimum relationships and community outreach with all constituencies including community organizations, governmental entities, the media, consumers and the general public. Represents AT with community groups.</p>	<p>Rating (fill in circle): <input type="checkbox"/> No Opinion</p> <p style="text-align: center;"> O-----O-----O-----O-----O-----O-----O 4 3 2 1 Total – 3.9 </p> <p>Comments: 1. 4, No comment. 2. 4, Ellen projects and has a positive perspective and she works easily with a broad range of “consumers”. She is leading the Senior Services Collaborative and represents our community well at state and local events. 3. 4., No comment 4. 4., Is constantly meeting with both non-profit and commercial organizations, has developed a well know reputation as an advocated for senior services and increased the visibility of Aging Together. 5. 3.5, No concerns here. Ellen is strong representative of the organization and connected with the right people. 6. 4., Continued outstanding representation for AT. She is well liked and respected among multiple stakeholders. 7. 4.0, Great attendance at County events.</p>
<p><u>Rating Key:</u> 4 = Outstanding (consistently exceeds standards) 3 = Highly Effective (often exceeds standards)</p>	<p>2 = Good (meets standard) 1 = Needs Improvement</p>

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<p>7. <u>Manages AT Administrative Duties Effectively</u></p> <p>Oversees all administrative functions, including donor database management, communication with IRS, State Corporation Commission, Dept. of Consumer Services and other outside entities. Handles routine financial management and day-to-day operation of the Association in collaboration with accounting firm.</p>	<p>Rating (fill in circle): <input type="checkbox"/> No Opinion</p> <p style="text-align: center;"> O---O---O---O---O---O---O 4 3 2 1 Total – 3.7 </p> <p>Comments: 1. 4, No comment. 2. 4, Ellen makes sure the administrative and financial duties are done. 3. 4., No comment. 4. 3.8, Has actively increased administration of database management, and outreach through staff development and leadership. 5. 3, I'm not aware of any issues here; much of this has been contracted out to the CPA firm. 6. 3., Ellen has shown diligence and effectiveness in keeping pace with the organization's increasing complexity. 7. 4.0, No comment</p>
<p>8. <u>Maintains Effective Board Relations</u></p> <p>Takes the initiative to keep Board Members informed of important developments in and outside of the organization. Is responsive to inquiries and concerns of the Board. Provides timely and relevant reports and presents appropriate plans of action. Meets regularly with the Board of Directors to review progress and deliverables; provide staff support to the Board and its committees; meet regularly with the Board Chair</p>	<p>Rating (fill in circle): <input type="checkbox"/> No Opinion</p> <p style="text-align: center;"> O---O---O---O---O---O---O 4 3 2 1 Total – 3.9 </p> <p>Comments: 1. 4, No comment. 2. 4, Ellen is a great ED and does a great job of keeping the board leadership informed. 3. 4, No comment. 4. 4, Provides excellent reports of activities at board meeting and with committees, provides well documented reports well in advance and is an effective leader making excellent support and training for staff. 5. 4, No concerns on this aspect of her performance. 6. 3.5, Responsive and highly supportive of Board functions. 7. 4.0, Keeps Board apprised of all organizational matters.</p> <p style="text-align: right;">Grand Total Average – 3.75</p>

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4 = Outstanding (consistently exceeds standards)

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2 = Good (meets standard)

1 = Needs Improvement

COMPLETE THE FOLLOWING QUESTIONS.

Are there important things the Executive Director should change or introduce to improve the way the Board functions or to increase the effectiveness of the organization?

1. No opinion.
2. No
3. No comment.
4. Has increased the effectiveness of Aging Together and never misses an opportunity to be effective.
5. I believe Ellen continues to operate effectively and is very good at responding to the Board's requests and/or suggestions.
6. Follow through on initiative to restructure and increase staff capacity to support operations.
7. No comment.

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Are there any important behaviors the Executive Director should change to improve effectiveness?

1. No opinion.
2. No
3. No comment.
4. Could increase visibility of staff so that the board and others are more familiar of their expertise and skills.
5. I think there are two areas I'd like to have more information from Ellen on during the next year. One is employee/human resource management – as we continue to grow, and especially since Aging Together is largely remote work, it will be important to have structures in place to ensure retention and administrative oversight are meaningful and effective.

The second is related to funding sources and contractual obligations. As an organization, we have been blessed by flexible funding from PATH. I think we would benefit from continuing to diversify funding sources, but feel that we need to ensure awareness of different requirements of funding sources and the implications of contracts where funds are to be used for specific purposes (staff working on transportation grants, as an example). What mechanisms are in place, or planned, to ensure we are fulfilling our obligations under contracts, etc.?

6. N/A
7. No comment.

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Is there any additional feedback you would like to provide about the Executive Director's performance?

1. Ellen is a wonderful advocate for the aging population. Her communication skills are to notch and takes the time to effectively communicate needs with the county teams and the board.
2. We are lucky to have someone of Ellen's caliber as our ED. She has brought on other employees (which is new for us) and she's had to figure out HR "stuff", doing an exemplary job of it.
3. Ellen is most efficient in her role. She communicates well and appropriately and seems to keep on top of everything. Excellent worker!
4. Outstanding, we are so fortunate to have such an exemplary Executive Director.
5. N/A
6. Ellen continues to be a highly effective advocate and positive force for carrying out the AT Mission in our region.
7. Great work done this year on Board development.

THIS PERFORMANCE EVALUATION FORM WAS COMPLETED BY:

Board Member: _____
(Print Name)

Date: _____

*** Please return to Lisa Peacock (lap.dss@gmail.com) by 6/26/2023.
Thank You!**